Chief Information Officer / CRM / Dynamics 365 Developer Lead Chief Information Officer / CRM / Dynamics 365 Developer Lead Chief Information Officer / CRM / Dynamics 365 Developer Lead - CohnReznick LLP Washington, DC 19+ years of IT experience with 10+ years as Chief Technical Officer / Microsoft Dynamics CRM Developer Architect having strong managerial, development and architecting experience in manufacturing, retail, supply chain, ecommerce, insurance domains with Microsoft Dynamics CRM 365, 2016, 2015, 2013, 2011 CRM version. Manage IT Staff Budgets, projects, technology roadmap and vision. 8+ years of experience as a product subject matter expert and product support in supply chain, ecommerce services and solutions. B2B B2C HRIS HCM Core responsibilities include merchandising - setting promotions, clearance on products, forecasting and budgeting for inventory across stores and territories. This also includes logistics involved with costs related to transport from third party vendors and supply to customers (both B2B, B2C) Expert at interfacing with clients, cross functional teams (Agile/Scrum/XP), managing sales team, demonstrating product features and handling questions or concerns. Solutions-oriented professional who excels at managing projects, collaborating with project teams, interfacing with clients, and deploying technology to build successful solutions for clients. Excellent data analysis and data warehousing skills. Sound experience working with ERP, CRM, CMS, SQL, XML, XSL, business process flows, scripting, Pivot Tables and Pivot Charts to Analyze Data in Excel. Good experience with Microsoft Project Plan and OpenProj Planning Software tools, Excel, Visio, PowerPoint. Work Experience Chief Information Officer / CRM / Dynamics 365 Developer Lead CohnReznick LLP - Roseland, NJ June 2016 to Present Project Details: CohnReznick is one of the leading tax, auditing, advisory and accounting firm in US. It uses Elite as its back ERP with a plan to migrate to Dynamics 365 and establish a bi-directional sync. With that in mind, core responsibilities included- Accelerated CRM pilot project. Basic features included collecting account, opportunities, sales process flow and matters in CRM across advisory, auditing, accounting and tax business lines. Business opportunities included details for Risk Management. Project also included developing custom .NET application integrating with Cloud/Azure to synchronize new accounts/opportunities/matters in CRM with Elite ERP System. Other Responsibilities: Direct the development and implementation of Cloud strategy and approach. Renegotiate supplier contracts, resulting in $1M+ annualized saving in operating expenses. Recommend long-term approach to strategic suppliers and technologies with the aim of optimizing operations and delivering savings. Tested and released pilot version. Testing includes accounts, sales, opportunities and matters creation in CRM and pushing to Elite ERP. Setting, starting up azure/cloud integration application and configuring azure configuration parameters including deploying Web Application (HookCatcher) to cloud, Azure Message Bus configuration including Queue set up. Developed - CRM Plugin sends updated account / matter to queue via WebAPI call to hookcatcher WebAPP which pushes a message on the queue using the message bus service. Integration Application threads reads message off queue, and process it, pushing message to Elite ERP System via Elite SOAP Service calls. Simultaneously status updates from Elite synchronization are updated in CRM via integration application. Also specific account, matter updates from Elite ERP (single and batch mode) are updated to CRM via Azure Cloud hookcatcher web application. Batch updates are also possible from CRM to Elite and threads status (jobs processed) are visible through a cloud status web app. Fix bugs in integration application for account /matter sync. Tax Short form was developed to collect client W2/1099/1065/sub account tax form details to sync with Elite. Based on Tax Service Area selected, custom action was called using SOAP API. Custom Action is tied to a plugin. Plugin Retrieves the Service Codes for the particular Service Area back to front end JS which is parsed and displayed in drop down web resource for user to select appropriate service code for that tax service area. Sample Industry Groups - for a tax matter I.e., Tax Service Areas - Perform W2 for a client, 1099 for a client, 1065 for a client or for a client child company. Sample Service Codes.- 1099 / PAYR/ 1065, PROP. Once appropriate fields are filled, form is submitted to sync to Elite via Azure Integration Application. Developed integration code between 365 and Elite. Integration is based off Azure API's and sits in the cloud using Core Azure SDK's - routes, maps, cloud service bus, cloud web apps/api's. Published entity detail to website using ADX Portal Studio/ Dynamics Portals. Web Pages, Entity Lists, Web Templates, Steps, Javascript, TypeScript, Liquid Templates. Published and synced CRM entities to Marketo using BedrockData. Prototyped Azure IoT, tested sending messages from sensors to hub. Developed and tested Customer 360 degree view on CRM including voice recognition using Unified Desk and Custom Development. Set up forms, security roles and other adhoc user requests to CRM features. Environment: ASP.NET, C#, VS 2015, Dynamics CRM 365, Simego, Azure WebApp, Service Bus, Microsoft Dynamics CRM , Marketo, Click Dimensions, ADX Portal, Entities, Plugins, Web Resources, XRM Page, Workflow, IOrganization, IDiscovery Service, Security, Permissions, Option Sets, Business Process Flows, WCF, LINQ, JQuery, FetchXML Founder and Chief Technical Officer / Dynamics Architect Developer ST Solutions June 2015 to Present Project Details Budgeted and managed resources and software development efforts in Application Builder Application. Application Builder allows user to definer primary and related entities on the D365 platform and creates records for secondary entities once primary entity is created along with lookups of secondary entities on primary entity main form. Secondary entity also has lookups created for primary entity. Managed offshore team of 18 developers / PM's. Started website www.gameon.buzz that collects and displays news feeds, weather information with background gifs and publish to social media platform. Also provides search ability using Microsoft's Bing Cognitive Services. Tested IoT implementation using Microsoft Chips. Chip senses pressure, temperature, moisture and sends data back to IoT Hub on Azure Cloud. This prototype is useful for auto irrigation facility in plantation based on soil moisture content. Chief Technical Officer / Microsoft Dynamics CRM Developer Architect Morgan Lewis & Brockius LLC October 2014 to June 2016 Project: Proposal Management System Responsibilities Spearheaded innovative new service offerings that generated an additional $21M in revenue. Supplied leadership and oversight of 2800 technology/consulting resources, requiring mentoring, performance management and career development. Hold all financial responsibility for product development, implementation, support, and internal servers/network including revenue, utilization, margins and R&D budget. Gather requirements from stakeholders and operate as a part of a scrum team performing in bi-weekly sprint cycles. Used Microsoft Sure Step methodology to implement the product features right from gathering requirements through development, testing and deployment. Part of an Agile Scrum team delivering features on a bi-weekly sprint cycle.

Imported excel sheet for prototype data using CRM Import Wizard. Created additional lookup columns to map to lookup fields (entity references). Entities included - Practice Groups, Attorneys, Client, Matter, Time and Billing Data. Install, configure and set up Simego software tool for data transformation from external source. Map data sets to CRM entities and develop plugins to set up lookup values. (using fetchXML) Trigger Workflow steps to update Experience entity based on creation / update of Matter Record. Develop Javascript (XRM) web resource to fire plugin on click of OK button. Javascript uses SOAP protocol to call Action request which in turn fires plugin. This was needed to collect user selections off checkboxes and create/delete related entities accordingly and display their Quick View forms in a tab section. (Experience and Related Entities Project) - similar customization performed for Tax Practice Group. Set up Simego Ouvii Server Projects to handle scheduled daily data import into the CRM System as part of Time and Billing Synchronization. Also configure steps to generate emails containing data log/errors of daily import in customized format. Add metadata programmatically and manipulate formXML using Systemform, QueryExpression and AttributeMetaData (OneToManyRequest For LookUp Fields) (Generate System Class File using CrmSvcUtil) through plugins. Programmatically register step through plugin. Calling custom actions using WebAPI. Added Client Feedback Note to Attorney on Matter. Adding feedback to the "Add Attorney Feedback" and clicking on WebResource Button calls custom Action via a WebAPI call in the Xrm Javascript. Convert Option Set into mutli-select list of check boxes as a html webresource. Trigger OnChange plugin event to populate secondary optionset with values based on selection in primary optionset. Set up / format entity fields, numbers, decimals, lookups, currency displays, sub grids, associated views, advanced find. Debugging using Plugin Tracing Service / printing to test entity. Back-up/ restore Org from DB. Set up Duplication / Business Rules on fields. Set up user security profiles for system access. Start stop refresh CRM Services / server to handle system slowness. Demo and train users the use of the software. Set up Marketing Lists, Campaigns, Integration with Outlook, Email Templates with CRM Content. Environment: VS 2015, CRM 2015/365, Simego, Windows Server 2012, .NET, Microsoft Dynamics CRM , Marketo, Click Dimensions, ADX Portal, Entities, Plugins, Web Resources, XRM

Page, Workflow, IOrganization, IDiscovery Service, Security, Permissions, Option Sets, Business Process Flows, WCF, LINQ, JQuery, FetchXML Microsoft Dynamics CRM Developer Architect CRM Sherwood Valve March 2012 to September 2014 Project: Migrate Product, Business Sales Process, CSR department to the CRM Platform Responsibilities: Gather requirements from stake holders and operate as a part of a scrum team performing in bi-weekly sprint cycles. Used Microsoft Sure Step methodology to implement the product features right from gathering requirements through development, testing and deployment. Part of an Agile Scrum team delivering features on a weekly sprint cycle. Clean, massage and import excel data using CRM Import Wizard. Created additional lookup columns to map to lookup fields (entity references). Entities included - Customers, Product Lines, End Products, Sales History, Current Sales (12 months). Set up Business Process Flow for New Sales Opportunity Pipeline. Add Dialogs for (Phone to Case feature) for Customer Services Representatives to be able to take customer details/ complaints over the phone and tie the complaint to an end product / product line / company with follow up tasks. Convert Option Set into mutli-select list of check boxes as a html web resource. Trigger OnChange plugin event to populate secondary optionset with values based on selection in primary optionset. (End Product / Product Line) Set up / format entity fields, numbers, decimals, lookups, currency displays, sub grids, associated views, advanced find. Debugging using Plugin Tracing Service / printing to test entity. Backup/ restore Org from DB. Set up Duplication / Business Rules on fields. Set up user security profiles for system access. Start stop refresh CRM Services / server to handle system slowness. Demo and train users the use of the software. Environment: VS 2015, CRM 2015 On-Premise, Microsoft Excel, .NET, Microsoft Dynamics CRM, Entities, Plugins, Marketo, Click Dimensions, ADX Portals, Web Resources, XRM Page, Workflow, IOrganization, IDiscovery Service, Security, Permissions, Option Sets, Business Process Flows, WCF, LINQ, JQuery, FetchXML Java / Microsoft Dynamics CRM Developer Architect Burlington Coat Factory - Burlington, NJ April 2009 to February 2012 Responsibilities Involved in the complete lifecycle of dynamics implementation - analysis, design, development, deployment and operation. During analysis developed the project plan, user training requirements, functional requirements, gap analysis, integration/interface requirements and data migration requirements. Manage CRM activities, campaign, sales pipeline, opportunity data, charts for better decision making. Evaluate customer business needs. Customize forms & views. - Accounts, Sales Order History, Open Sales Orders. Add fields, properties, text, radio buttons, drop down options. Create Custom Business Processes. Dialogs (Phone Dialog for Customer Service Representative - Case), Workflows. Business Process Flows. (Lead to Opportunity, enable security roles). Customize System to allow for batch updates to accounts sales. (daily jobs that update previous 12 month and last 12-month sales fields in accounts) Data Import / Mapping. Analyzing import issues and rectification. Bulk Record Deletion. Duplication. Customized Data Imports. (Accounts, Orders, History) Run reports, export, set up users, roles, business units. Develop and deploy plugins for auto task creation for manager on account creation. Develop and deploy workflow activities - both using out of the box workflow activity step and custom workflow activity creation. Out of the box workflow step included setting appointments for sales reps as part of business process flow. Custom workflow activity included creating account and task for use in workflows and dialogs. Provide team demonstrations of system.(Powerpoint and system demos) Perform analytics (excel and SQL) for reporting, budgeting, planning and forecasting. Set up security profiles, privileges, permissions for users across Organization. Involved in the complete lifecycle of dynamics implementation - analysis, design, development, deployment and operation. During design developed the FDD, process test scenarios, integration/interface design and data migration design section in document. Install Microsoft Dynamics AX 2012 - R2 on Windows 8 with Hyper V Document existing business process flows. (Word, Visio Pencil) Environment: .NET, Microsoft Dynamics CRM, Entities, Plugins, Web Resources, XRM Page, Workflow, IOrganization, IDiscovery Service, Security, Permissions, Option sets, Business Process Flows, WCF, LINQ, JQuery, FetchXML, Agile, Scrum, Sure Step. Microsoft Dynamics CRM Developer FiftyOne Inc - New York, NY October 2007 to March 2009 FiftyOne is the recognized market leader in international ecommerce and operates a technology and services platform that enables U.S. retailers with international ambition to transact with consumers in more than 90 countries worldwide. FiftyOne manages all aspects of international orders including multi-currency pricing and payment processing, landed cost calculation, customs clearance and brokerage, international fraud management, international logistics orchestration, and customer-experience parity. Apart from eCommerce system responsibilities, application involved setting up HRIS system (Workday) to handle internal payroll, scheduling, time and attendance and providing analytics. Responsibilities Develop detailed business requirement, functional and technical documentation for the project. Interface with cross functional team to discuss requirement, development, timelines and test plans. Update Microsoft Project Plan with status and WBS - Work Breakdown Structure. Communicate project status on a daily basis to team and upper management. Develop business uses cases, workflows, scenarios, pricing elements related documentation/ specifications. Manage CRM activities, campaign, sales pipeline, opportunity data, charts for better decision making. Evaluate customer business needs. Customize forms & views. - Accounts, Sales Order History, Open Sales Orders. Add fields, properties, text, radio buttons, drop down options. Create Custom Business Processes. Dialogs (Phone Dialog for Customer Service Representative - Case), Workflows. Business Process Flows. (Lead to Opportunity, enable security roles). Customize System to allow for batch updates to accounts sales. (daily jobs that update previous 12 month and last 12-month sales fields in accounts) Data Import / Mapping. Analyzing import issues and rectification. Bulk Record Deletion. Duplication. Customized Data Imports. (Accounts, Orders, History) Run reports, export, set up users, roles, business units. Interface with development team during SDLC to ensure functional requirements are being implemented correctly. Perform testing (Unit Testing UAT, System and Integrated Testing) Trouble application looking at log files and suggesting corrective action. (Web Service, SOAP API logs) Develop adhoc SQL Queries to test application data - SQL Server / Oracle. Run Web Services, SOAP Services to test application functionality and debug. Serve as SME - Subject Matter Expert companywide for HRIS system. Deploy systems company wide and perform migrations to newer versions. Conduct presentations to team - application and business related. Interface with Finance and Accounting to handle payroll, merchant accounts, invoices, billing, General Ledger, accounts receivables, payable, credit/debit memo's and inquires related to system -

sales and distribution. Tying capacity Planning to inventory, set up of shop calendars (work centers and machine centers), assembly routes Perform production planning based on current customer (and anticipated future orders). Export inventory to excel, update and publish back to dynamics. Manage CRM activities, campaign, sales pipeline, opportunity data, charts for better decision making. Develop specification and system documents for EDI exchange (810, 850, 855, 856, 867) with merchants and vendors. - Seeburger Use of cloud-based computing for business. Represent company at trade shows. Integrate with ERP system to synchronize data. Environment: .NET, Microsoft Dynamics CRM , Entities, Plugins, Web Resources, XRM Page, Workflow, IOrganization, IDiscovery Service, Security, Permissions, Option Sets, Business Process Flows, WCF, LINQ, JQuery, FetchXML POS Sales Project Fiserv - New York, NY November 2003 to October 2007 Systems Analyst Description: Positive Pay Project involved selling a system for reconciliation between cheques issued and the cheque presented at the bank. (ACH reconciliation, payment processing) Remote Deposit Project enabled deposit to be made online using a scanner to scan the cheque and uploading it to the bank website. Openlink: Support Openlink products that include financial/commodity trading software. Responsibilities included: Demonstrated applications to client (sales /training). Respond to RFI/RFP's. Providing Proof of Concept (POC) demos. System Installations, ensuring front, middle and back office trade flows are set up correctly in the system. Set up EOD (End of Day), RTP job flows in the system. Implement/Install Risk Management Solution - Findur for Openlink Clients. Managed onsite team implementation of trading platform and connections. Debug issues in Findur's Risk Management Modules (including Trading Manager, Market Manager), streamline EOD processing, RTP (Real Time Processing), jobs and ensure batches run smoothly on the Findur Grid. (provide level 2 support) Instrumental in development, training and troubleshooting of ADS (Active Data Services) technology as an addendum to APM (Active Position Monitoring) used in Endur/Findur for monitoring positions. Ensure third party connections (ICE, Bloomberg) and maintained and trade messages are appropriately exchanged. Provide technical training internally and externally on Openlink products.

Gathered requirements from the managers for development of the application. Analyze requirements and develop business and functional specification documentation. (RTM) Directs and participate in the product launch process. Manages all the incoming requests and provide technology with data needed to build new products or enhance existing products. Set up and support of Fiserv - POS systems. Updating manual with product specs and demonstrating to client. Takes ownership of assigned products, trouble shoot and serve as the subject-matter-expert Analyze support calls and debug issues using FIX, SQL, XML, XSLT, batch scripts and log errors and issues in Mantis -bug tracking tool. Use of Error Log Viewer, System Monitor and Console to identify issues and escalate if needed. Maintain thorough knowledge of industry regulations, Chase Paymentech systems and internal applications. Participate in trade shows. Manual and Automated testing of application. Deploy systems company wide and perform migrations to newer versions. Maintain C level relationship Environment: Microsoft Project Plan, Microsoft Dynamics CRM, Word, Excel, Powerpoint, SharePoint, ERP, CRM, Scrum (Agile), EDI, HRIS - Workday, CMS, Oracle ATG, ACH, Java, JMS, MQ Series, Tibco Rendezvous, Multicast, Datagram, UDP, Microsoft Dynamics, OMS, FIX, EFT, EDI, SWIFT, NACHA, IRIS PEP+, payments, .NET, Perl, Salesforce, SQL Server, SOAP, Windows XP, Citrix XenApp 10.0, IIS, IBM WebSphere, WinRunner, JTest, LoadRunner, Agile Support Consultant MassMutual - Springfield, MA June 2002 to September 2003 Project: Online Investment Portfolio Description: MassMutual provides investment services to individuals and corporate clients. The prime responsibility was to support an existing investment portfolio providing agents to complete online individual investment application forms based on their licensing criteria and the investment type. The investment type could be Mutual Funds, Brokerage, CRIA (Corporate registered investment advisor) across a range of products using FIX protocol. The software developed had to be integrated within the MassMutual framework. Additionally, a credit card authorization application using XiPay (chase paymenttech) was designed. Responsibilities included: Demonstrated applications to client. Providing Proof of Concept (POC) demos. Respond to RFI/RFP's Maintain C level relationships. Answer Sales Support calls coming into the queue and provide high level of quality service through first call resolution. Serve as an advocate and interface for all of MassMutual's partners with internal and external operational departments and vendors. Log calls using detailed, specific and professional remarks in internal system. Participate in the planning and execution of periodic sales meetings. Suggest and sell new products and services to partners to promote new and additional business. Work with team to validate options for new accounts. Work closely with Relationship Management and Training to ensure the best service and training needs of the various sales organizations are met. Act as Subject Matter Expert to resolve issues, conflict, new product features. Function as backup/overflow for Merchant Services and Technical Services departments. Manual and automated testing of application. Perform miscellaneous job duties as assigned. Interacted with various cross-functional units to discuss business features and processes. Environment: Online Investment Portfolio System (Stocks, Bonds, Funds), Documentum - EDMS, OCR, POS, EDI, CRM. Microsoft Project Plan, Rational UML Tool, PowerPoint, Excel, SQL, UNIX, CRM, ERP Analyst /Lead Web Developer Consultant Menon Consulting - Exton, PA May 2000 to May 2002 Project: HSN WebApp Description: QVC is a home shopping network multinational corporation, specializing in televised and web-based shopping. QVC offers products from a wide variety of famous brands and well-known celebrities. The prime goal of HSN WebApp was to provide a complete e-Commerce online solution and support. Responsibilities: Work closely with sales executives on assigned opportunities to provide technical pre-sales support throughout the sales cycle executing the customer engagement model. Support sales executive in setting the sales strategy for accounts. Participate in discovery meetings/calls with customers in conjunction with the sales executive to identify potential areas to explore with the customer and technically qualify the opportunity. Position solutions and products effectively to differentiate from competitive products/solutions and appropriately to the business and/or technical audience. Apply active listening and selling techniques such as objection handling, laying traps, etc. Prepare and deliver high-level technical presentations, demonstrations, and prototypes Respond to requests for information (RFIs) and proposals (RFPs) for qualified opportunities. Gather requirements and scope for proofs of concepts (POCs) as required fulfilling the evaluation criteria by the customer and highlighting differentiators of Progress. Work collaboratively with sales executive to ensure the most effective use of time and effort to progress opportunities Cultivate valuable customer or partner relationships and provide proactive account management with technical contacts to up-sell and cross-sell within the account Provide a single technical point of contact during the sales cycle while coordinating with internal teams, such as for diagnosing and resolving any product issues Travel to customer sites for training, consulting or providing any on-site support as needed. Environment: Microsoft Project Plan, Visio, SQL, CRM, PHP, MySQL, Shopscript, XAMPP, HTML, XHTML/DHTML, JavaScript, XML, AJAX, Webservices, XML-RPC, Ant, XSLT, Apache Web Server, Windows, Linux Sony, Montvale, NJ Analyst/Support Consultant Project: Support Sales and Incentive (EIM - Enterprise Incentive Management). Responsibilities: Support CRM web portal activities. Provides analytical, configuration and support for business systems and processes Work with sales and customer service (including marketing communication, warranty processing, opportunity tracking and asset tracking). Reporting using business intelligence tools (SQL Reporting Services, data warehouse) and Microsoft Office components. Gathering business requirements from users and translating these into requirements documents and change requests. Global HealthCare Exchange Support Consultant Project: HealthCare (B2B) Portal Description: GHX creates supply chain management services for healthcare buyers and sellers. The J2EE software developed at GHX helps electronically connect business partners, increase the accuracy of data across the ordering process, and make supply chain practices more efficient, ultimately improving quality and reducing costs to allow healthcare companies to do what they do best: provide patient care. Responsibilities: Solicit new accounts. Make presentations. Develop and implement medical transcription software - billing and payroll. Also developed an EDMS software for managing patient health records and interface with voice recognition software. Submit daily/ weekly reports (proposal & success). Attending job fairs (recruiting & seeking new accounts). Report daily transactions, reconcile accounts, set up users, permissions, and access, and create dashboard modules. Conflict resolution (act as SME and resolve problems between facilities and employees/agency if & when they do occur). Technology used: Java, SQL, Javascript, Windows, GUI, CRM Education Bachelors in Engineering in Engineering Bombay University - Mumbai, Maharashtra 1998

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