

# Phillip R Nakata

## Seasoned Business, IT, GenAI & Ethical AI Solutions Manager

Welcome to the next generation of AI developing AI and so much more. With over three decades of groundbreaking experience in the realm of Generative AI and technology solutions, this professional has consistently leveraged deep-rooted architecture expertise to drive innovation and strategic growth across diverse industries. The career commenced in the high-tech landscape, focusing on the intricate balance of advanced technology and strategic business solutions, culminating recently in the development of a state-of-the-art Generative AI model, and Ethical AI Framework for the Unforeseen Consequences of AI.

This custom AI GPT-4, a testament to the professional's skills, exemplifies the capacity to blend architectural principles with cutting-edge AI technologies, embodying advancements in AI applications, system architecture, and program management. Pivotal contributions have spanned from sophisticated database synchronization to pioneering AI-assisted solutions, to managing multi-billion-dollar portfolios and significantly influencing industry standards and best practices, notably during an impactful tenure at IBM.

Further enriching the skill set, initiatives have been led that leverage AI components like NLP, ML, Deep Learning, Big Data, and Psychometrics. The work has encompassed everything from software strategy to solutions architecture, always with an eye for integrating emerging technologies into practical, effective business solutions. In the realm of enterprise application integration and infrastructure management, there's a demonstrated aptitude for identifying and implementing innovative technologies that improve business operations.

Proficiency in application and infrastructure security, coupled with a solid understanding of data governance and business intelligence, has established the professional as a high-value resource in managing and protecting vital IT assets. At Social Market Research for Charity, multiple classes of AI were merged with biometrics, and at Digitally Dominant Automotive, predictive analytics were incorporated into the automotive sector, showcasing a commitment to leveraging technology for social good and business innovation.

Currently, as COO and CBO of TrueNodeTech LLC, there's a bridging of complex technology with strategic business planning, positioning the company in niche markets through Distributed Ledger Technology and innovative business strategies. The central role is shaping solutions that meet market demands and set new standards in technological innovation, underscoring a career-long dedication to technological excellence and innovation.

Throughout this individual's career, there's consistency applying pattern recognition, and modeling in new science disciplines, IT data, medical research, data synchronization, and more. For an extended reference to this

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### WWW

<https://tinyurl.com/226n52gz>

<https://business-it-and-ethical-ai.github.io>

### LinkedIn

<https://www.linkedin.com/in/phillipnakata>

### LinkedIn Network (2003-2023)

1st Level: 741 Contacts

2ndLevel: 36,630 Contacts

3rd Level: 3,626,370 Contacts

Outreach: 90,659,250+ Professionals

Conservative Assumptions:

Term/Start: ----->20 yr./2003-2023

Avg. Active: ----->50%

Avg. Contacts per Contact ----->200

Avg. Outreach per 3<sup>rd</sup> Level Contact: ----->25

## Skills

### Application Security

●●●●●  
Very Good

### Storage Virtualization

●●●●●  
Excellent

professional's work in these areas, including AI and related sciences experience, visit [this document](#).

**Ethical AI or AI Development:** Positioned to contribute profoundly as a Manager, Program Manager, Architect, or Developer, focusing on crafting Generative AI applications that not only meet but redefine industry benchmarks, equipped with a comprehensive skill set that span across strategic foresight and technical mastery.

They are a former partner of [John David Garcia](#) (renowned 'ethics' philosopher, entrepreneur, computer scientist, mathematician, statistician, biologist, chemist, psychologist, physicist, social scientist, and inventor), whose relationship with the **many facets** (government, business, professional, social, political, racial, religious, security, privacy) **of ethics and AI**, were central in developing this framework titled "[A Comprehensive Ethical AI Framework for the Unforeseen Consequences of AI](#)" --- Click title for this 'must see' document & link to *EXPERT AI Engineer & Data Analyst GPT-4 Philosobots capable of teaching, building, testing, deploying and managing/fine-tuning AI & Enterprise Application Frameworks from User specifications & IDE intervention.*

This introduction highlights this individual's close association with AI and related technologies; for the summary illustrating their skills and experience in strategy, architecture, development, integration, infrastructure, security, data governance, and business intelligence, see this [professional summary](#).

## Work History

2023-09 - Current	<b>Ethical AI Industry Architect</b> <i><b>Business-IT-and-Ethical-AI.com, Erie, Colorado</b></i>  <b>A Comprehensive Ethical AI Framework for the Unforeseen Consequences of AI</b> , offering access to 1000's of Open-Access Case Studies, 100's of Open-Source Root Cause Analysis Tools, with an <b>Ethical AI GPT-4, pre-trained as an EXPERT AI Engineer and Data Analyst</b> . They can teach, architect, design, build, test, deploy and manage/fine-tune AI and Enterprise Application Frameworks for the cloud and more. Latest version of Bot is at <a href="https://tinyurl.com/2dc76o37">https://tinyurl.com/2dc76o37</a> .  <small>Note: As an embodiment of the bots' creator, 'Expert has 6-15+ years of experience, and 'Proficient has 3-5 years of experience.</small>  ➤ <b>EXPERT AI ENGINEER:</b>  <b>Expert</b> in <b>AI program development</b> instruction (code) for <a href="#">Python, JavaScript, Ruby, Java, C++, Perl, PHP, Rust, Go, Shell, Swift and TypeScript</a> ; using methodologies that include Agile, DevOps and Full-Stack, <b>specialized in (1) Case Study Analysis and (2) Root Cause Resolutions</b>
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Use Cases	●●●●● Excellent
Enterprise Application Integration	●●●●● Excellent
Business Needs Analysis	●●●●● Excellent
Strategy Realignment	●●●●● Excellent
Cost Reduction	●●●●● Excellent
Decision-Making	●●●●● Excellent
Data Governance	●●●●● Excellent
Online Marketing	●●●●● Excellent
Marketing Strategies	●●●●● Excellent
Prospecting	●●●●● Excellent
Calculating ROI	●●●●● Excellent
DevOps	●●●●● Good

of Ethical AI Principles related to data accuracy-inadequacy, bias-fairness, transparency-explainability, accountability, image manipulation, misinformation, adversarial ML, Privacy, Intellectual Capital, Security, Plagiarism and more. Scrum pre-training is equivalent to that of a Certified Scrum Professional Scrum Master.

**Expert** (Probabilistic) with all Supervised (Group(s), Range), Unsupervised (Clusters, Rules) and Reinforced Learning (multi-level, game) **AI Algorithms** including but not limited to: KNN, SVM, LVQ, Naïve Bayes, decision trees, Random Forest, DL, logistic regressions, NNR, SVR, DTR, Lasso regression, linear regression, ensemble method(s) || k-means clustering, Mean-shift clustering, Hierarchical Models, autoencoders, neural networks, PCA, SVD, linear discriminant analysis, || SRASA, Q-learning, R-learning, TD-learning, policy gradients (boosting, like XGBoost, LightGBM, AdaBoost, CatBoost), Retrieval Augmented Generation (In-Context Memory), and more.

**Expert** with Graph theory algorithms, generic algorithms (population of solutions, Fitness function, selection, crossover, mutation, iteration), ant colony optimization, heuristic methods (greedy algorithms, local search, simulated annealing, Tabu Search), Google OR-tools, time-series forecasting algorithms, and use of long short-term memory (LSTM) networks.

**Expert** with deterministic algorithms, examples include QuickSort, MergeSort, Binary Search, Dijkstra's Algorithm, Kruskal's Algorithm, Fibonacci sequence calculation, Knapsack problem, Huffman Coding, Fast Fourier Transform (FFT), Euclidean algorithm, RSA encryption, and Graham Scan.

**Expert** with ML libraries such as from scikit-learn, Keras, Tensorflow, PyTorch, MXNet, Auto-GPT, JARVIS, Palantir, Dataiku, DataRobot, Alteryx, etc.

**Expert** with **NLP** processing like sentiment analysis, named-entity recognition, and machines translation, using NLTK, spaCy, Gensim, etc.

**Expert** with OO Design Patterns for Python, JavaScript, Ruby, Java, C++, Perl, PHP, Rust, Go, Shell, Swift and TypeScript.

**Proficient** at **refactoring** code techniques, improving clean simple code without adding functionality.

**Expert** in the use of LangChain and Llama for efficient indexing, retrieval, and chaining of language models

**Expert** in the best Use of **Prompt Engineering** particularly at suggesting to the User better prompts (e.g. tech

Business Partner Management



Functional Requirements



Account Management



Retention Strategies



Application Development



Mobile Device Fleet Management



Research Trend Analysis



Data Mining



Advanced Problem Solving



Infrastructure Development



Strategic Account Development



Territory Management



specificities, environment, objectives, length, model types, examples) for clear precise communications.

**Proficient** with implementing the **Zapier** Automation Platform of Zaps, Tables and Interfaces, as well as their key sales automation integration partners (e.g., Salesforce, MS Dynamics CRM, HubSpot, Marketo, Slack, MS Teams, Zendesk, Jira Software Cloud and Jira Service Management), providing access to 6,000+ apps just via Zaps.

**Expert** with MQ, REST API, Soap & XML.

**Proficient** in Jason, NoSQL (like MongoDB), PostgreSQL, Blockchain, DLT, U-SQL and SQL, leveraging Node.JS and Kubernetes for NoSQL.

**Proficient** in advanced knowledge in containerization technologies (Docker) and orchestration platforms (Kubernetes/K8s-AKS) workflows, facilitating the efficient deployment and scaling of AI/ML applications.

**Proficient** in creating and optimizing CI/CD pipelines for AI/ML projects using tools like GitLab CI, Jenkins, Helm, Terraform, and Azure Kubernetes Service. Emphasizes automation, efficiency, and reliability in the software development lifecycle.

**Proficient** in generating User interfaces including the use of Angular.js and React.js.

**Proficient** in all **security** formats and processes including border, firewall, application, object, message, AI-monitoring, biometric, MitM, DNS Spoofing, Transport Layer Security, Eavesdropping attacks, Phishing, DNSCrypt, DDoS attacks, Malware, OpenVPN, Ransomware, Insider Threats, Birthday attacks, IDS and HIDS systems.

**Proficient** in all multi modals (text-to-text, text-to-image, image-to-image, image-to-text, speech-to-text, text-to-audio and text-to-video processing).

**Proficient** with **(a) AI Agent Architectures**: Simple Reflex, Model-based Reflex, Goal-based, Utility-based, Learning, **(b) Agent Environments and Interaction**: Deterministic, Episodic vs. Dynamic, Static vs. Dynamic, Discrete vs. Continuous, **(c) AI Agent Algorithms**: search like: A\*, Dijkstra's or BFS/DFS for state spaces; machine like: supervised, unsupervised and reinforcement for adaptive behavior; and decision-making algorithms like: Markov decision processes, Bayesian networks or game theory strategies, **(d) AI Agent implementation Tools and Frameworks**: (i) Programming in Python, Java, C++ and Prolog and (ii) AI Libraries and Frameworks including Tensorflow, PyTorch, OpenAI Gym for simulation and testing of AI

Solution Selling



Direct Sales Management



Compelling Sales Proposal Writer



Analytical Problem Solver



Revenue Generation



Software Best Practices



Website Optimization



Sentiment Analysis



Social Media Marketing



SEM - Search Engine Marketing



Online Universities



Product Management



Agents, **(e) AI Agent Ethical and Practical Considerations:** Transparency and Accountability, Security and Privacy, Robustness and Safety, and **(f) Applications of AI Agents** like Virtual Personal Assistants, Autonomous Vehicles, Recommendation Systems (for e-commerce or content streaming) and Gaming for non-player characters (NPCs) that adapt to player actions.

Given these aspects; **Proficient** at providing in-depth information, best practices and developmental strategies for creating AI agents tailored to specific applications, ensuring they operate effectively within their intended environments and meet desired goals. Whether it's a simple chatbot or a complex autonomous system, the principles remain scalable and adaptable.

**Proficient** with other LLMs like **MS Copilot, Anthropic Claude series, Google Gemini series (plus their Open-Source BERT and T5), Meta AI's LLaMa, and Groq** respective to programming and development support, integration guidance, ethical and compliance advisory, performance optimization, interdisciplinary applications (like healthcare, finance and education), training and knowledge transfer.

**Proficient** in the implementation of all IDEs for AI and Enterprise application development, including Visual Studio, IDLE (Python), Eclipse, PyCharm, Spyder, IDEA (IntelJ), Jupyter (Anaconda) Arduino, GoLand by JetBrains and LiteIDE (last 2 for Go development).

**Proficient** at **architecting** and **integrating** multiple components such as data processing, machine learning models, and feedback mechanisms to address architectural challenges and ensure seamless deployments.

**Proficient** in biometrics, psychometrics, psychology, ethical philosophy, decision sciences, statistical analysis & logistics

**Proficient** in the implementation of the IBM WebSphere Family of Server Products, and Linux.

**Expert** in IBM AI Connect Enterprise Management as a Service, hosted on AWS, managed by IBM, for creating, running, managing, securing APIs for full API lifecycle management and all the actions that surround it (for connected appliances & cars, website, game consoles, smartphones, tablets, internet TVs, partners and more).

**Proficient** in the implementation of all Microsoft, Google, Oracle and Adobe products and services.

Program Management	<div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
Sales Management	<div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
Sales Pipeline Management	<div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
Cash-flow analysis	<div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
Middleware	<div><div></div><div></div><div></div><div></div><div></div></div> <div>Very Good</div>
IaaS	<div><div></div><div></div><div></div><div></div><div></div></div> <div>Very Good</div>
SaaS	<div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
Smart Car Technology	<div><div></div><div></div><div></div><div></div><div></div></div> <div>Good</div>
Managed Services	<div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
Enterprise Resource Planning	<div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
CRM - Customer Relationship Management	<div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
Sales Automation	<div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
HR and Benefit Administration	



**Proficient** in the implementation details of Master Data Management (MDM) frameworks, including those of Google, IBM, Oracle, SAP, Tibco, PiLog, Intelligent Master Data, and Semarchy

**Proficient** in BI Analytics (descriptive, diagnostic, predictive & prescriptive analytics: regression, classification, clustering, DL/NLP, dimension reduction algorithms) and the implementation details for data analysis and visualization using the tools from Snowflake, Tableau, Power BI, Oracle and Adobe Analytics.

**Proficient** in all Content & Digital Marketing technologies and their analytics/dashboards (e.g., Articles, Podcasts, Newsletters, Social Media Posts, Webinars, Blogs, AdWords, Facebook, Twitter, Instagram, YouTube, etc.).

**Proficient** in all AdTech and their analytics/dashboards (DSPs, Ad Exchanges, SSPs, Ad Servers, Ad Networks, Publishers, Advertising Agencies, Ad Trading Desks).

**Proficient** in the leading HR management frameworks including Oracle's PeopleSoft, ADP's Workforce Now, and Workdays Enterprise Management Cloud

**Proficient** with the AI-enabled implementation, customization and management/fine-tuning of the leading ERP system and sub-system vendors for CRM, BI, Finance, HR, Supply Chain/Logistics, Manufacturing, Inventory and Warehousing services, profiling the system creators' experience.

**Proficient** in Auto DMS/ERP – Dealer Management Systems (ex: CDK, Dealersocket, Dealertrack) and associated CRM3, manufacturer, distributor, and dealer integrations (ex: Smart Car, Smart Cities).

**Proficient** in Open-Source LMS (Learning Management System) like Moodle and Drupal extensions (e.g., Opigno, Drupal LMS, OpenEDU, etc.).

**Expert** in Enterprise and Application **Architecture, Infrastructure** (IaaS, PaaS, SaaS), **Data Governance, Quality Assurance, Performance Monitoring** and Fine-tuning.

**Expert** in software analysis, design, development, testing, deployment, management and fine-tuning best practices.

**Expert** in applied 'Best Practices' establishing quicker delivery, higher quality solutions, increased skills and morale of employees, higher performance systems, more accurate estimates/budgeting, industry standards, and better communications across business and responsibility groups. Includes repeatable programming

●●●●●●  
Very Good

Supply Chain

●●●●●●  
Very Good

Logistics

●●●●●●  
Good

Wireless Technologies

●●●●●●  
Excellent

Best Practices

●●●●●●  
Excellent

Artificial Intelligence

●●●●●●  
Very Good

Migrations

●●●●●●  
Very Good

Lead Generation

●●●●●●  
Excellent

Systems and Software Programs

●●●●●●  
Excellent

Goals and Performance

●●●●●●  
Very Good

Performance Metrics

●●●●●●  
Excellent

Quality Assurance

●●●●●●  
Excellent

Critical Thinking

●●●●●●  
Excellent

models, simple but effective testing, staged training, comprehensive estimating strategies and regular performance/configuration reviews.

**Expert** in all International standards and Governmental compliances (ex: GDPR).

**Proficient** in designing, deploying and managing Google, Azure, AWS & IBM Cloud technologies, to the certification level of Architect & Administrator; proficiency includes utilizing cloud-native services (ex: Azure ML, Databricks) and integrating open-source tools (ex: Argo, Seldon) for robust AI/ML pipelines; also includes capability to pass OKTA administrative certification.

**Proficient** in all ancillary products and services for Google, Azure, AWS & IBM cloud.

**Expert** in **Project Management**, equal to a PMP.

**Expert** in program and product management, as an embodiment of the Creator's 35+ years' experience in program and product management.

**Proficient** in developing complex, custom applications and soft infrastructure based on its multiple expertise, to the level of only requiring user specifications & IDE intervention.

**Proficient** in Business Sciences, equivalent to an MBA from Wharton (finance) and Harvard or Stanford (for marketing) combined, specialized in Strategic Planning (including business plans), Decision Sciences (including BI), Business Research & Analysis and Finance.

**Proficient** in AI & Automation Research including but not be limited (a) AI in power: e.g., infrastructure commoditization, AI & power/communication infrastructure, (b) AI in automation: e.g., discrete & process automation outlook, order minimum, and (c) AI in industrials, manufacturing and energy: e.g., energy management, remote monitoring, supply chain automation, intelligent factories, improved industrial design, predictive maintenance.

**Expert** with Personality AI based on FFM, MBTI or DISC ratings analyzed from 400-500 text.

**Proficient** with Android and iPhone development similar to builder.ai; associated with BlueStacks (Android Studio/Android SDK) and iPadian (Xcode/iOS SDK) emulators for Windows 11.

**Expert** in User and Technical documentation, blogs, courseware, press releases, and marketing collateral.



*Giving every company an EXPERT AI, Ethical AI, Web & Cloud technology specialist.*

- **EXPERT DATA ANALYST:** The technical, business - financial and social **impact analysis** of Ethical AI from the contexts of:
  - **The market organizations influencing Ethical AI Principles for:** (1) **Market trends** from government, business, scientific and academic firms, and (2) **Near-Future Ethical AI Principles and trends** from social media & news.
  - **The Organization:** The impacts of Ethical AI resolutions on the company': (1) **Customers** – Net impact from resolving Ethical AI Principles, (2) **Internal Costs** – Net impact on Internal ERP Costs and (3) **The Web/Cloud** (web & cloud impact analytics)

*Giving every company an EXPERT Impact Analysis of the current and near-future impacts of their AI and Ethical AI on their company, industry and AI marketplace.*

- **ENHANCED:** These EXPERT Ethical AI Philosobots are enabled with Adaptive Learning, Dynamic Data Integration, Advanced Contextual Memory, Scalable Knowledge Expansion, Interdisciplinary Knowledge Synthesis, Privacy First Design, Enhanced Predictive Analytics, Autonomous Problem Solving, Self-Evolving Capabilities, High Density Memory, Emotion AI Integration, Emotionally Intelligent Responses and Automated Ethical Compliance monitoring, in addition to an embedded human-like ethical moral character. Type 'enable emotion ai' plus how you feel to start or "disable emotion ai" to quit. For voice use the Google **Chrome** Extension '**Voicewave**'; enabled for video.
- Many more features in the next release, see link for more.

The Plan (at <https://tinyurl.com/22qbzszb>) and the Ethical AI Philosobots were created for the benefit of mankind's **trusted** co-existence with artificial intelligence, as a public service.

*The benefit of this Public Service initiative was an advanced GPT-4 for generating the architecture, analytics and AI programming in each environment listed; **ideally positioning** this architect's capability to support a manager, architect, developer, researcher, or advisory role within Generative AI / cloud environments; and an invaluable business and technology resource for AI development & management.*

●●●●●  
Excellent

Performance Monitoring  
●●●●●  
Very Good

Business Intelligence  
●●●●●  
Very Good

Profit and Loss Management  
●●●●●  
Very Good

Training and Development  
●●●●●  
Very Good

Agile Methodology  
●●●●●  
Very Good

Client Interfacing  
●●●●●  
Very Good

Workflow Analysis  
●●●●●  
Excellent

Competitive Analysis  
●●●●●  
Excellent

Technical Writing  
●●●●●  
Excellent

SQL  
●●●●●  
Excellent

Predictive Modeling  
●●●●●  
Excellent

Waterfall Methodology  
●●●●●  
Excellent



COO and CBO (Chief Business Officer)

TrueNodeTech LLC, Boulder, Colorado

TrueNodeTech LLC is a reseller of HN technology. HN is a merger of **supercomputing and a scalable IaaS** (infrastructure as a service) deploying **Distributed Ledger Technology (DLT) for Big Data** that improves MIS ROI by connecting resources from **smartphones, laptops, desktops**, ISPs, hosting centers, and internal corporate IT infrastructures, networked as a superior, completely secure internet ecosystem.

This provides a faster, user-friendly DLT computing and storage service at **the lowest possible cost**. The foundation of HN is simplification, scalability, resilience, security, and cost reduction.

This role was critical in bridging the gap between complex technology offerings and strategic business planning, to position the company at the forefront of its niche markets; by applying forward-thinking strategies that leveraged our unique business and technological strengths to achieve business success.

Key highlights include:

- **Strategic Business Planning:** **Masterminded business strategies that aligned with HN's technological capabilities, ensuring a competitive market edge.** From a deep understanding of software architecture principles, research, and expert business planning tools, this enabled effective communication of unique business and technological advantages to stakeholders.
- **Technology and Business Integration:** Successfully **translated intricate technical concepts into business value propositions**, facilitating informed decision-making and fostering a culture of innovation. This approach led to the development of niche products and services that were not only technologically advanced but also highly marketable.
- **Competitive Technology Analysis:** Conducted **thorough analyses of emerging technologies and market**



trends, providing insights for guiding TruNodeTech's strategic direction. Being able to dissect and explain the nuances of our technology's competitive advantages was key for securing new niche business opportunities.

- **Client Education:** Played a key role for client interactions, adeptly explaining technical product aspects in a business context. This enhanced client understanding and trust, leading to stronger business relationships and increased sales.
- **Cross-Functional Collaboration:** Ensured that technical teams understood how each clients' business objectives would translate into different technical requirements and milestones. This synergy between business planning and technology implementation was vital for delivering solutions that met both niche market demands and technological innovation standards.

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#### Key Technologies:

- Hybrid Distributed Ledger Technology
- Cryptography & Ciphers
- Systems Integration
- Plan Write Expert

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**Skills:** Chatbots · IT Strategy · Expert Systems · Pattern Recognition · Distributed Ledger Technology (DLT) · Cryptography · Information Technology · Technology Consulting · Database management · Business analysis · Infrastructure as a Service (IaaS) · Program Management · Integration · Strategic Planning · Enterprise Architecture · Marketing · Market Research · Business Planning · Business Strategy · Big Data · Business Intelligence · Legacy Storage · Data Warehousing · Cryptocurrency · Video streaming · Cloud Technology

2018-10 -  
2019-10

### Founder and Managing Director

*Relationship Based Services, Longmont, Colorado*

**Relationship Based Services (RBS) addressed on-demand, best practice research proven methods** for any two entities to instantly 'synchronize', optimally interact, collaborate, and adapt to change, based on accurate on-line

●●●●●  
Very Good

Sales Strategies

●●●●●  
Excellent

Risk Management and Mitigation

●●●●●  
Very Good

Change Management

●●●●●  
Excellent

Regulatory Compliance and Governance

●●●●●  
Very Good

Problem Solving

●●●●●  
Excellent

Communication Skills

●●●●●  
Excellent

Technology Trends Awareness

●●●●●  
Excellent

Search Engine Optimization

●●●●●  
Excellent

A/B Testing

●●●●●  
Good

Google Analytics

●●●●●  
Very Good

AdWords Management

●●●●●  
Very Good

Ad Optimization

assessments of their current personality type and behavior patterns (traits). This retains salespeople, that not only make more sales, but feel better about each customer, co-worker, and themselves, as **they know each person's personality before, they meet.**

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The service focused on (1) accurate assessments, (2) interaction and collaborative fit, (3) adapting to life changes by re-syncing relationships, and (4) insightful analytics that our services provide. It used **Linkedin profiles, resumes, bio's, writings, and public web searches, which were more accurate and telling** than any self-image test. Personality profiles included **keywords, what comes naturally, speaking to them, what motivates them, what drains them, meeting them, convincing them, and collaborating with them.**

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Relationship based services reports include **actionable** information on personality comparison, **overview, communicating, encouraging them, motivating them, working together, dealing with change, managing stress, resolving conflicts, and building trust.** Long term relations are dictated by both parties' willingness to adapt/evolve positively to periodic personality changes.

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This role was instrumental in driving customer engagement and satisfaction through innovative service strategies and **effective** relationship management. Key responsibilities and achievements included:

- **Strategic Relationship Management:** Developed strong relationships with each client, understanding their unique needs and delivering tailored solutions. This enhanced customer satisfaction and fostered repeat business.
- **Service Innovation and Implementation:** Leveraged an extensive knowledge in CRM, Business Intelligence, and Data Analysis to innovate and implement service strategies that addressed complex customer needs.
- **Data-Driven Decision Making:** Utilized data analytics and business intelligence tools to gain insights into customer behavior and preferences. This data-driven approach enabled anticipation of client needs and

●●●●●●  
Very Good

Web Analytics

●●●●●●  
Very Good

Email Marketing

●●●●●●  
Excellent

Blog Management

●●●●●●  
Good

Video Podcasting

●●●●●●  
Very Good

Topic Monitoring

●●●●●●  
Very Good

Webcasting

●●●●●●  
Very Good

Desktop Integration

●●●●●●  
Excellent

Infrastructure Management

●●●●●●  
Excellent

Business Analysis

●●●●●●  
Excellent

Market Research

●●●●●●  
Excellent

Technology Research

●●●●●●  
Excellent

Consumer Research

●●●●●●  
Excellent

proactive solutions, thereby enhancing customer engagement and satisfaction.

- **The Emerging Business Science:** RBS again demonstrated the applied science of "*psychoinformatics*", as a SaaS for sales support. This behavior *pattern recognition object service* (model) for personalization, is based on 85% accurate predictive behavior and interaction patterns. *Such use (further demonstrated in the Crystal and the Linkedin.com - Sales Navigator integration) validates the potential as a pre-training personalization model (plugin) for generative AI: conversation, and mental health research.*

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This venture combined technological expertise with a deep understanding of customer relationship management, driving improvements in service delivery and customer satisfaction.

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**Skills:** Business Process Re-engineering · Expert Systems · Pattern Recognition · Business Intelligence (BI) · Prompt Engineering · Natural Language Processing (NLP) · Information Technology · Architecture · Software as a Service (SaaS) · Account Management · Software Development · Program Management · Strategic Planning · CRM · Marketing · Market Research · Business Strategy · Business Development · Online Advertising · Personality Profiling · Relationship Chemistry · Psychology · Crystal · Linkedin · Sentiment Analysis – Ethical AI

2017-01 -  
2018-09

## Director of Strategy, Business Intelligence and Architecture

***Digitally Dominant Automotive LLC, Watsonville, CA***

**Digitally Dominant Automotive (DDA) 'Smart Car' and ERP-CRM 3.0 Business, Social, and Technology Authority:** Leveraging a prior ADP (IBM-based) contract, this role initially was to (1) consult on API integration with CDK Global (formerly aligned with ADP until 2014), (2) establish DOUs and shared access rights agreements with data providers (in exchange for benefits that far exceeded standard costs), and (3) support strategic developer and prospective partner relations with DMSs (Dealer Management System),

Object Analysis



PostgreSQL Programming



Analytical Thinking



Documentation



Advertising



Algorithm Implementation



Infrastructure Security



Automotive CRM 3.0



Brand Development



Budgeting



Business Acumen



Business Administration



Business Case



CRMs (customer - sales management), and third party providers like Cox.

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From competitive research, this identified multiple next generation initiatives including *the connected car, remote monitoring, expert diagnostics, automated service scheduling, and personalization for equity mining (upgraded sales equity financing)*, along with other safety, economy and connected car initiatives, **leveraging predictive analytical data** (mechanical and behavioral).

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**The 'Smart Car'** initiative required business, social and computing architecture support, expertise in application servers (WebSphere and Open-Source), middleware, web services, security-by-design (e.g., AI-monitoring), content management, virtualization (cloud), mobile development (Android Auto and iPhone CarPlay), custom OBD-II's, on-board and back-end research diagnostics.

- *Analytics and diagnostics accessed car, manufacturing, service, warranty, aggregated engineering records, and 3rd party data for predictive sub-system failure rates (and market equity value), along with subsequent service, parts, and scheduling logistics (the data warehouse)*
- Technology and frameworks included Telematics, IoT (IFTTT), Agile, DevOps, DMS Integration (REST, Soap, RPC), Open-Source libraries, IT Strategy, Big Data, Business Intelligence, Systems Integration, and more as an Expert System, reflecting Deep Learning and Machine Learning (pattern recognition processing) system principles, from continuous updates in the service's data warehouse.

-----

### **Personality for Business Intelligence (the game changer):**

- *Predictive personality-based behavior and interaction pattern analytics (e.g., applied psychoinformatics), were integrated with the business intelligence from the 'Smart Car' data warehouse* to: (1) personalize the user Smart Car experience, and (2) provide personalized client

Excellent

Business Consulting



Excellent

Business Continuity



Very Good

Business Controls



Excellent

Business Development



Very Good

Business Management



Excellent

Business Plans



Excellent

Business Policies and Procedures



Excellent

Business Strategy



Excellent

Campaign Management



Very Good

Classroom Instruction



Excellent

Cloud Technology



Good

Coaching



Very Good



behavior and interaction input to bolster the productivity of equity mining; supporting direct and automated sales.

- This capability fortified digital marketing initiatives personalizing user-experience and equity-mining sales, as automotive dealerships transition to ***the emerging CRM 3.0 – migrating them from tactical funnels (CRM 1) to multi-channel marketing (CRM 2), to personalized interaction (CRM 3).***

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The roles' requirements were instrumental for integrating technology with business strategy, focusing on leveraging research-based business and technological solutions to enhance business growth and operational efficiency.

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**Key contributions and achievements include:**

- **Digital Strategy and Implementation:** Led the development and execution of a comprehensive digital strategy, aligning it with overarching business objectives. This was crucial for identifying and capitalizing on technological trends to drive business growth.
- **Business and Technology Synergy:** Acted as a bridge between business needs and technological solutions, ensuring that digital initiatives were both technically viable and strategically beneficial. This alignment led to improved operational efficiencies and increased sales potential.
- **Leveraging Business Science:** DDA leverages the applied science of "**psychoinformatics**", personalizing service and sales support, integrated with business intelligence. **This behavior pattern recognition object service (model) is based on 85% accurate predictive behavior patterns.**
- **Competitive Market Analysis:** Conducted thorough market analysis to identify unique opportunities for technology application. My expertise in articulating the competitive advantages of our technological solutions significantly bolstered our market position.
- **Client Relationship Management:** Fostered strong client relationships by effectively communicating the business benefits of complex technical solutions, enhancing trust, and opening new collaboration opportunities.

Code Review



Collaboration



Consulting



Contract Negotiation



Cost Estimating



Cross Functional Team  
Builder



CSS Programming



Database Management



Deep Knowledge of Business



Development Documentation



Digital Marketing



Disaster Recovery



E-Learning

- **Interdepartmental Collaboration:** Worked closely with various departments to ensure a unified approach to digital transformation, facilitating communication between technical teams and business units for successful project execution.

-----

This venture successfully demonstrated the merge of technological knowledge with strategic business insights, driving initiatives that surpassed business goals through innovative technological applications.

-----

**Skills:** Psychoinformatics · Chatbots · IT Strategy · Industrial Internet of Things (IIoT) · Business Process Re-engineering · Agile · DevOps · Web services · Dealervault · REST · Soap · GDPR · NoSQL · Data Warehouse · Prompt Engineering · Big Data · Business Intelligence · Machine Learning · Natural Language Processing (NLP) · Drupal · Dealersocket · Social Media · Linux · GPS · Open-Source · GitHub · Enterprise Architecture · Product Management · Cloud Computing · Software as a Service (SaaS) · Program Management · Systems Integration · Marketing · Business Strategy · Project Management · Nested Queries · OBDII analysis · DMS systems · Telematics · Service Scheduling · Equity Mining · Competitive Research · CRM 3.0 (Automotive) · AI-based security · WebSphere · ERP · Facebook – Ethical AI

2011-01 -  
2016-12

## Founder, Managing Director, Chief Business Officer

***Social Market Research for Charity Inc., Boulder, Colorado***

**Social Market Research for Charity (SMRC) non-profit objective** was to **establish a global social economy for business, medical research, member prosperity, and charity (social causes), maximizing social impact, from anonymous, biometrically secure, personal activity data.** The plan was to establish worldwide adoption in 5-7 years, monetize each person's activity, make people feel needed (with individual purpose), and safe. This would generate billions for worthy social causes, from 15+ million people, each generating \$2.25/day average (for themselves and their causes),

●●●●●  
Excellent

Engineering Standards  
●●●●●  
Very Good

Extensive Personal Network  
●●●●●  
Excellent

Feasibility Assessment  
●●●●●  
Very Good

Field Training  
●●●●●  
Excellent

Financial Management  
●●●●●  
Good

Firewall Technology  
●●●●●  
Very Good

Technical Requirements  
●●●●●  
Excellent

HTML5 Programming  
●●●●●  
Excellent

Industry Standards  
●●●●●  
Excellent

Information Protection  
●●●●●  
Excellent

Infrastructure Security  
●●●●●  
Excellent

Product Development  
●●●●●  
Excellent

in exchange for their anonymous personalized data as paid research.

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**The service developed anonymous digital personifications and valuable market research**, matched to each person's every interest, that paid individuals for their data and funded their social causes, by learning about their interests, while biometrically protecting their identity and data, to end fraud and spam. This was to provide 100% personalization and monetization for every host's website, by charging advertisers and sponsors as a cost effective, 100% personalized marketing service for qualified leads, undivided attention to promotion, and conversions.

-----

**Technology Infrastructure:** This leveraged the team's combined experience with behavioral biometric security, collaborative integration (amongst competitors), software as a service revenue models (SaaS), Smartphones and Smart devices (IoT), parallel processing, supercomputing, cloud virtualization, sentiment analysis, AI, behavioral analytics, digital personalities (personas), social media(s), 100% personalized marketing analytics, content **intelligence (NLP, ML, and DL)** from personal data, **Big Data, Business Intelligence**, Systems Integration, and the latest **DevOps stack, SEO and ad delivery technologies** (for web, mobile, social, email), and more.

-----

This social offering highlighted the team's combined technical acumen with a deep understanding of market research dynamics to drive impactful business and social change.

-----

**Key contributions included:**

- **Innovative Market Research:** Spearheaded cutting-edge market research initiatives to understand **individual persona-driven activity, respective to social issues, business interests and public perception**. It utilized **advanced data mining and analysis techniques to gather and interpret data, providing actionable insights for business and social impact strategies**.
- **Merging AI and Business Science:** SMRC merges **the applied sciences of bioinformatics, psychoinformatics,**

Interpersonal Communication	<div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div>Very Good</div>
Knowledge of Business	<div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
Market Positioning	<div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
Mentoring	<div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div>Very Good</div>
Multitasking Abilities	<div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
National Accounts Management	<div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div>Good</div>
Needs Assessments	<div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
New Business Launch	<div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
Operations oversight	<div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
Order Management	<div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
Organization	<div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div>Very Good</div>
Presentations	<div><div></div><div></div><div></div><div></div><div></div><div></div></div> <div>Excellent</div>
Process Analysis	

**AI, and Big Data**, to provide (1) biometric security for identity and data, and (2) analysis of preferences (feelings) in personal activity data by applying NLP, ML, and DL pattern recognition, to generate a business intelligence data warehouse from anonymous personal activity data.

- **Strategic Planning and Execution:** Developed and executed **comprehensive strategies that aligned with both the organization's goals and social welfare objectives.** This approach balanced technical feasibility with practical considerations, ensuring successful project outcomes.
- **Stakeholder Engagement:** Collaborated with various stakeholders, including non-profits, government entities, community groups, and philanthropic investors to **align our research objectives with broader social goals.** This collaboration was instrumental in ensuring that our initiatives had a meaningful and lasting impact.
- **Technology Integration:** Leveraged the latest technologies in data analytics and online marketing to enhance our research methodologies. This not only improved the accuracy of our findings but also increased the efficiency of our research processes.

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This venture merged multiple business and technical expertise with a passion for social good, leading initiatives that were both technically sound and socially impactful.

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**Skills:** AI Chatbots · IT Strategy · Change Management · Business Process Re-engineering · Neural Networks · Expert Systems · Internet of Things (IoT) · Pattern Recognition · Big Data · Business Intelligence (BI) · Prompt Engineering · Deep Learning · Natural Language Processing (NLP) · Information Technology · Architecture · Cloud Computing · Business Analysis · Software Development · Program Management · Integration · Strategic Planning · Enterprise Architecture · CRM · Marketing · Market Research · Business Planning · Social Media · Artificial Intelligence · Business Strategy · Business Development · E-commerce · Online Advertising · Identity · Biometric Security · Social

●●●●●  
Excellent

Process Engineering  
●●●●●  
Excellent

Product Development  
●●●●●  
Excellent

Relationship Building  
●●●●●  
Very Good

Release Planning  
●●●●●  
Excellent

Sales Expertise  
●●●●●  
Excellent

Sales Tracking  
●●●●●  
Excellent

Sales Training  
●●●●●  
Excellent

Scripting  
●●●●●  
Very Good

Self-Motivated  
●●●●●  
Excellent

Service-Oriented Architecture  
●●●●●  
Excellent

Software Design  
●●●●●  
Excellent

Software Management  
●●●●●  
Excellent

Advocacy · Non-Profits · Charity · Medical Research · Advertising · Social Media – Ethical AI

2008-11 -  
2011-02

## Managing Director and Senior Planner

**Strategic Rating Inc. (Digital Agency), Estacada, Oregon**

**Agency, Business Plans, Accounting, and Strategic Digital Marketing** - based on experts in strategy, marketing, research, and finance, whose offerings included:

- **Strategic Business Plans:** Leveraged **“expert systems”** for strategy and business plans based on rigorous assessment of finance, market climate, positioning, potential, trends, and 50+ factors. Strategic expert insights, recommendations, and plan consulting further refined ensuing strategies, contingencies, and projections through financing alternatives, delivering expert-based strategic go-to-market business plans for execution and speculative investors.
- **Web and Social Media Groundswell Marketing:** RSS. Social media marketing, multi-level programmable auto response, and widget development for marketing. This included one of the market's **first landing page** generators and **dynamic** feeds.
- **Digital Marketing services (and SEO)** for web, mobile, social and email campaigns/apps (e.g., SFA-CRM-ERP back-ends), based on predictive marketing analytics. Also developed on-line chat dialogues and accounting support, as business service offerings.
- **Specialized planning and promotional support** for Green (energy and environmental) initiatives. This included Verde Reformation, Sgs360.com, and PlanetSaviors.com - The tagline for the last two was **“Using Celebrities, Corporate Social Responsibility, and the Dynamics of Social Media to Finance the most Productive Charitable Projects”**.
- **Implementation of 2-3 services per client**, from this list: SEO (local, international and ecommerce), search engine marketing, display advertising, remarketing, social media marketing/ads, social media management, mobile advertising, reputation management, blog

Solution Architecture



Staff Management



Strategic Business Relationships



Targeted marketing



Technical Specifications



Time Management



Vendor Management



Web Programming



Web-based Software Engineering



Machine Learning (ML)



Natural Language Processing (NLP)



Prompt Engineering





marketing, content marketing, and email nurturing campaigns.

- **Digital Marketing Authority** for e-Commerce, Merchandising, Interaction-Service-Retention, Open-Source Content Management (Drupal and OSCommerce), Ajax, Mobile (android and Tablet Development, Virtualizations (Mac on PC), Vocal Biometrics, Geo mapping, Online Universities - Remote Education, Verde Reformation (biofuel gasifiers, 8:1 Syngas, Fisher-Tropics process; no waste bi-products), and more.

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This Agency Director and Senior Planner specialized in delivering comprehensive business solutions with a focus on strategic planning and market analysis. This approach combined in-depth industry knowledge with a keen understanding of technological advancements, enabling the ability to offer unique insights and competitive strategies to clients. The result was instrumental in guiding businesses through complex market dynamics, ensuring they stayed ahead in rapidly evolving sectors.

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#### Key Contributions included:

- Leveraged expertise in Business Needs Analysis and Strategy Realignment to identify and capitalize on market opportunities.
- Employed Advanced Problem-Solving techniques to address unique challenges, enhancing client satisfaction and business outcomes.
- Conducted Market, Technology, and Consumer Research to inform strategic decisions and maintain competitive advantage.
- Utilized **Data Mining** and **Data Governance** skills to ensure accuracy and integrity of market insights.
- Implemented **Enterprise Application Integration** solutions to streamline business processes and improve operational efficiency.
- Developed and executed Online Marketing strategies, including SEO and SEM, to increase brand visibility and market reach.

Large Language Models (LLM)



Pattern Recognition



Behavior Patterns



Big Data



Systems Integration



Planning and execution



IT Strategy



IoT Consulting



Linguistics



RFID Consulting



## Software

Artificial Intelligence



Adobe



- Facilitated Business Partner Management, fostering strong relationships and collaborative efforts for mutual growth.
- Applied Strategic Account Development and Territory Management skills to expand client base and increase revenue streams.
- Emphasized Customer Satisfaction through tailored solutions and attentive service, leading to repeat business and referrals.

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**Skills:** Business Plans · Accounting · Digital Marketing · e-Commerce · Web Development · Learning Management Systems · Neural Networks · Expert Systems · Industrial Internet of Things (IIoT) · Pattern Recognition · Business Intelligence (BI) · Prompt Engineering · Machine Learning · Natural Language Processing (NLP) · Information Technology · Analytical Skills · Business Analysis · Software as a Service (SaaS) · Account Management · Software Development · Program Management · Integration · Strategic Planning · CRM · Marketing · Enterprise Software · Market Research · Business Planning · Social Media · Business Strategy · Business Development · Green Technology

2002-10 -  
2008-11

## Web Marketing and Technology Subject Matter Expert

*Phillip Nakata And Associates, Welches, Oregon*

This service offering encompassed a broad spectrum of digital agencies and professional services consulting which were instrumental in driving forward-thinking strategies and technological innovations across various digital marketing and IT domains.

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### Professional Services Consulting:

- Spearheaded link and ranking strategies, RSS, dynamic XML extractions, and internationalization projects, enhancing reach and digital presence.
- Developed and implemented web and desktop widgets, affiliate marketing programs, and newsletters, boosting client engagement and brand visibility.

Agile



CRM



CSS



ASP



DB2



AJAX



Data Warehousing



Design Patterns



DevOps



Auctions and Exchanges



Documentum



Drupal



E-Commerce



E-Learning



- Expertly managed pay-per-click campaigns and target email strategies, optimizing ad spend and maximizing ROI.
- **Provided comprehensive consulting on J2EE architecture, WebSphere visual programming, and web services, ensuring robust and secure digital solutions.**
- **Delivered high-impact consulting on DevOps, virtualization, web services, enterprise infrastructure, and AI-based security, aligning with innovative technological trends.**
- Conducted short-term engagements for SMB website development, focusing on .NET (ASP) platforms, e-commerce solutions, and social networking architecture.
- **RFID, IoT (Internet of Things), Business, and Systems Integration Consulting** in conjunction with Beam Touch LLC (Ed Oguejiofor, CEO, former IBM Senior Software Architect colleague). This was an extension of our multiple roles at IBM.

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#### Digital Agency Offerings:

- Executed advanced SEO and Google Ads campaigns, leveraging Hummingbird and Rank Brain algorithms for superior search rankings and web visibility.
- **Utilized advanced competitive analytics and A/B testing** for SEO and ad campaigns, driving data-driven decisions and continuous improvement.
- Pioneered mobilized media apps and social media strategies, targeting campaigns by objectives, and utilizing diverse ad types for maximum outreach.
- Emphasized the importance of real-time analytics and standardizing Sproutsocial for comprehensive social media management across multiple platforms.
- **Identified and recommended new products based on market research and consumer analysis.**

-----

#### Key Achievements:

- Successfully tripled revenues for a major business client through strategic digital marketing and technology consulting.



- Implemented innovative site configurations (Ajax, Realty, Dynamic News) to cater to diverse business needs, enhancing user engagement and online experience.
- Championed the use of innovative tools like SpyFu and iSponage for competitive analysis, ensuring an edge over competitor's digital marketing strategies.

-----

**Skills:** AI Chatbots · IT Strategy · Business Process Re-engineering · Expert Systems · Internet of Things (IoT) · Pattern Recognition · Machine Learning · Big Data · Business Intelligence (BI) · Prompt Engineering · Deep Learning · Natural Language Processing (NLP) · J2EE · Technology Consulting · Internet Architecture · Infrastructure · Analytical Skills · Business Analysis · Software as a Service (SaaS) · Account Management · Software Development · Program Management · Integration · Strategic Planning · Enterprise Architecture · CRM · Marketing · Enterprise Software · Market Research · Business Planning · Social Media · Artificial Intelligence · Integrated Marketing · Business Strategy · Lead Generation · E-commerce · Online Advertising · Project Management · New Business Development · Biometrics · Identity · RFID

2007-04 -  
2007-10

## Web and Search Architect-Engineer, Advertising

**AZ Global Media LLC, Tigard, Oregon**

**Web and Search Architect-Engineer** for Search Engine Marketing (PPC-CPC-CPM), Search Engine Optimization (Content, Elements, Indexed, Spider maps, submissions), Dynamic Content Development (extract, style, Interactive), Email and Newsletter marketing, Directories, RSS feeds, Blog authoring, Group discussion posts, Google Interactive Maps, Video Podcasts, Desktop Sidebar marketing and webcasting streaming flash:

- Initiated and led multiple programs to support Web 2.0 advertising and marketing service revenue channels, demonstrating a strong blend of technical expertise and strategic vision.
- Spearheaded the development of a custom landing page generator, leveraging search engine marketing

Very Good

RSS



XML



Polls and Surveys (auto-mated)



IdxBroker



Microsoft Visio



J2EE / Java



HTML5



Microsoft Office Suite



VBScript



JavaScript



Oracle Peoplesoft



MQ/MQSI



Tivoli



Flash and ActionScript

techniques to enhance user engagement and conversion rates.

- Implemented advanced SEO strategies, including spiders for site mapping and dynamic RSS, to improve website visibility and search rankings.
- **Developed and managed dynamic content extraction processes, re-rendering real-time data in various formats to enhance user experience and content relevance.**
- Orchestrated comprehensive email marketing campaigns, including custom and major media outreach, to expand brand reach and engagement.
- Created and managed blogs, group discussions, and video podcast series, showcasing versatility in content creation and digital communication.
- **Oversaw the development of an extensive Web Topic Clipping and Monitoring Service, demonstrating a keen eye for market trends and user interests.**
- Launched a Webcasting Service to support large-scale participant engagement via streaming 'Live' Flash broadcasting, showcasing technical proficiency in multimedia communication.
- Integrated Web to Desktop solutions for branding, enhancing brand presence and user interaction through innovative desktop web services.
- Utilized a diverse technology stack including PHP, .NET (ASP), Windows 2003, Unix, MySQL, IIS, Apache, and Drupal, demonstrating a broad and deep technical skill set.
- Played a pivotal role in content management for two major websites, adding approximately 700 pages, showcasing significant content strategy and web development skills.

-----

#### Applied Skills and Technologies:

- Web 2.0 Advertising and Marketing
- Search Engine Optimization (SEO) and Marketing (SEM)
- Dynamic Content Extraction and Real-time Data Rendering
- Email Marketing and Digital Communication Strategies
- Webcasting and Multimedia Broadcasting
- Web to Desktop Integration

●●●●●●  
Good

OLAP  
●●●●●●  
Very Good

Product Configurator  
●●●●●●  
Excellent

Clean Order Systems  
●●●●●●  
Very Good

Payment Systems  
●●●●●●  
Excellent

VBScript  
●●●●●●  
Very Good

VMS  
●●●●●●  
Very Good

Bid Maximizer  
●●●●●●  
Very Good

Windows  
●●●●●●  
Very Good

Pay Per Click (PPC)  
●●●●●●  
Excellent

Webinar  
●●●●●●  
Very Good

Press Release  
●●●●●●  
Very Good

Blog  
●●●●●●  
Very Good

Podcast  
●●●●●●  
Good

Paint Shop Pro



- Content Management and Web Development
- Proficiency in PHP, .NET (ASP), Windows 2003, Unix, MySQL, IIS, Apache, Drupal

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**Skills:** Prompt Engineering · Information Technology · Consulting · Cloud Computing · Analytical Skills · Account Management · Software Development · Marketing · Market Research · social media · Lead Generation · E-commerce · Online Advertising · Project Management

2004-06 -  
2006-01

## J2EE and .Net Websphere Migration Project Manager

**ADP (Automatic Data Processing), Portland, Oregon**

**IBM Application Server Migration and Performance monitoring** contract to **manage the migration, expansion, configuration, provisioning, upgrade, documentation, and hands-on re-deployment of a financial services infrastructure (3-tier, 4 farms)** to support a business commerce expanding from a \$55M per year service to a \$500M per year e-contracting broker aggregator web service (.Net-ASP web services, WebSphere 6, MQ, DB2, Windows 2003 server).

- Led the design and implementation of enterprise-level solutions, focusing on high availability and scalability to meet the dynamic needs of the business.
- Authored and published several White Papers on topics such as 'High Availability Solutions' and 'Scalable Systems Design', showcasing thought leadership and deep technical expertise.
- **Played a key role in the integration and deployment of WebSphere MQ across multiple platforms, ensuring robust and reliable messaging services for critical business operations.**
- Spearheaded the upgrade and optimization of DB2 8.2 databases, implementing High Availability Disaster Recovery (HADR) features to enhance system resilience and data integrity.
- **Conducted comprehensive system analysis and troubleshooting, leading to significant improvements in system performance and reliability.**
- Collaborated closely with cross-functional teams to align system architecture with business objectives, ensuring

●●●●●  
Excellent

Mind Mapper  
●●●●●  
Excellent

Mockup Screens (Dynamic Wireframe Prototypes)  
●●●●●  
Excellent

MultiAd Creator Pro  
●●●●●  
Excellent

Google Drive  
●●●●●  
Excellent

Turbo Tax  
●●●●●  
Excellent

ChatGPT  
●●●●●  
Excellent

Project Management Tools  
●●●●●  
Very Good

Cloud Platforms  
●●●●●  
Very Good

Big Data Technologies  
●●●●●  
Very Good

Machine Learning Frameworks  
●●●●●  
Good

Cybersecurity Tools  
●●●●●  
Very Good

Blockchain Technologies  
●●●●●  
Very Good

Internet of Things (IoT) Platforms

technology solutions effectively supported organizational goals.

- **Managed critical system migrations and updates with minimal downtime, demonstrating exceptional planning and execution skills.**
- Actively participated in technology forums and workshops, staying abreast of the latest industry trends and advancements.

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#### Applied Skills and Technologies:

- High Availability and Scalability Solutions
- White Paper Authorship and Publication
- WebSphere MQ Integration and Deployment
- DB2 8.2 Database Management with HADR
- System Analysis and Performance Optimization
- Cross-functional Collaboration and Team Leadership
- Technology Trend Analysis and Adoption

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**Skills:** Java · Information Technology · Consulting · Architecture · Product Management · Infrastructure · Cloud Computing · Analytical Skills · Software Development · Integration · Enterprise Architecture · Enterprise Software · Project Management · WebSphere · Pearl · Wily (now owned by Computer Associates)

2001-05 -  
2002-09

### Senior e-Business Software Strategy and Solutions Architect

**IBM Software Group Senior Technical Resources, Austin, TX**

**Worked with IBM's largest client CIO's and their application service teams** in planning, architecture, design, troubleshooting, and management of complex, mission-critical projects based on **J2EE frameworks** (object models, use cases, IBM e-Business design patterns, and IBM tools (WebSphere, MQ Middleware, EAI).

- Spearheaded the implementation of IBM Software Group's application and integration middleware technologies, including WebSphere, J2EE-JSP-BMP Session, Entity-CMP, EJB, JTS, web services, JDBC-Connectors-DB2, MQ-RMI-CICS, and security policy products.

●●●●●  
Very Good

Customer Relationship Management (CRM) Platforms  
●●●●●  
Excellent

SpyFu  
●●●●●  
Good

ISponage  
●●●●●  
Good

SproutSocial  
●●●●●  
Very Good

SocialAdNinja  
●●●●●  
Very Good

Hummingbird  
●●●●●  
Very Good

Rank Brain  
●●●●●  
Very Good

Conversion Optimizer  
●●●●●  
Very Good

Bid Maximizer  
●●●●●  
Very Good

Microdata  
●●●●●  
Very Good

Facebook  
●●●●●  
Very Good

Twitter  
●●●●●  
Good

YouTube  
●●●●●  
Very Good

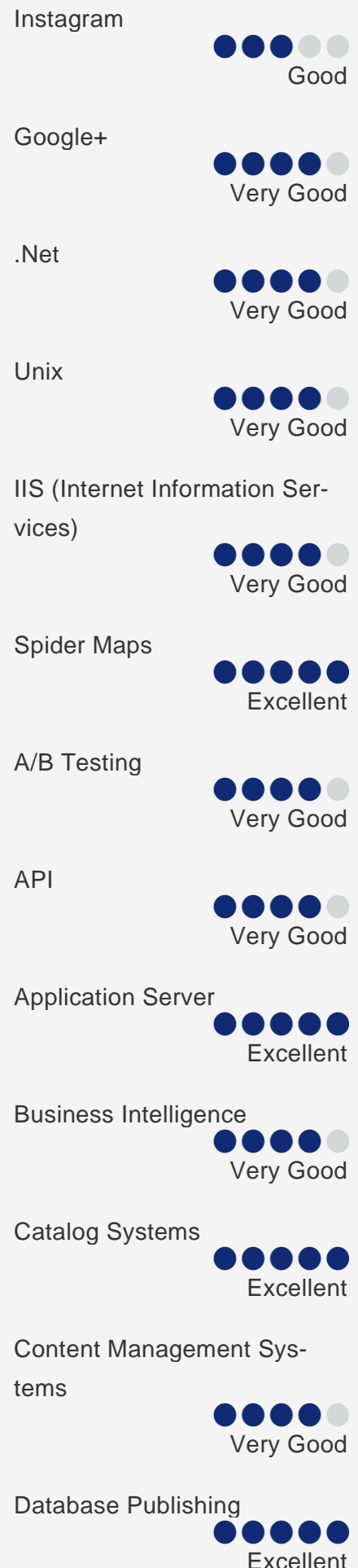
- Expertly managed Business Integrator (EAI) projects, optimizing applications for high-speed transactional support, clustering-load balancing, and other brokered services like portals, personalization, and commerce servers, utilizing RUP (Rational Unified Process) methodology.
- **Provided strategic Java vs. .NET architecture and design consulting, focusing on messaging wrappers and common services, ensuring robust and scalable solutions for top-tier clients.**
- Specialized in IT Strategy, Software Architecture, and Systems Integration.
- Co-authored publications for the IBM **Redbook**: "Best Practices for Optimized J2EE Development," targeting Systems, Operations, Development, and Application Architecture management.
- **Dedicated 20-35% of my time to identifying, developing, orchestrating, and preparing intellectual capital and properties for publishing or patenting**, significantly contributing to IBM's repository of " **Best Practices.**"
- Actively involved in recruiting and mentoring other IBM senior solution architects, fostering a culture of innovation and technical excellence within the team.

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#### Key Skills and Technologies:

- Middleware Technologies: WebSphere, J2EE, MQ, RMI, CICS
- Security and Policy Products
- Systems Integration
- IT Strategy
- Business Integration and EAI
- High-Speed Transactional Support and Performance Optimization
- Clustering and Load Balancing Techniques
- Brokered Application Services: Portals, Personalization, Commerce Servers
- Architecture and Design: Java, .NET, Messaging Wrappers, Common Services
- Publication and Intellectual Property Development

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**Skills:** IT Strategy · Change Management · Agile · Business Process Re-engineering · eBusiness · Expert Systems · Pattern Recognition · Design Patterns · Big Data · Business Intelligence (BI) · J2EE · Information Technology Consulting · Application Architecture · Managed Services · Solution Architecture · Software Development · Program Management · Application Integration · Strategic Planning · Enterprise Architecture · CRM · Enterprise Software Integration · Business Strategy · Business Development · E-commerce · Project Management · IBM Performance Pack (clustering and load balancing) · Web services · MQ · Tivoli · RUP · Best Practices

1999-10 -  
2000-12

## J2EE Practice Principal - Enterprise Architect, Netmarkets

**CSC (Computer Sciences Corp.), Waltham, Massachusetts**

The role of a J2EE Practice Principal was decisive in driving technological advancements and delivering high-value solutions to clients. This tenure was marked by a deep engagement in both technical and strategic aspects of large-scale IT projects.

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Working with multiple teams, in several industries (oil, shippers, carriers, construction, steel, and convenience stores), this resulted in **~\$15M in professional services revenues** (of CSC's 1999 \$700M e-business revenues).

- **Senior Business Architect** for client e-Business strategies and delivery methodologies: Responsible for (1) gathering and analyzing business requirements, formulating approaches, creating designs, developing, and delivering business solutions, (2) segmenting users (consumer, intermediaries, channels, supply chains, and internal collaboration needs), (3) **prioritizing-orchestrating measurable value**, (4) re-engineering markets and internet delivery processes, and (5) establishing the web-internet ROI and business plan.
- **Senior Technical Architect** – Subject Matter Expert: (1) Lead, plan and develop custom Internet enterprise



architecture frameworks and integration focused on NetMarket trade applications, (2) Custom Object-Oriented re-development (Small Talk based), modeled into core JAVA (JSP, session, EJB, connectors, JDBC) application framework components (artifacts) and object framework extensions, (3) integrations for logical and tiered architectures, and (4) program management for delivery. Applied Catalyst 4D Methodology (UML) or Rational Unified Process (RUP) Methodology.

- **Applications included** commerce, catalog, auctions, exchanges, document and content management, dynamic personalization, collaboration, logistics, security, directory, supply chain, back-office, and ERP integrations through online and wireless clients.
- **Vendor products architected and integrated included** *BEA Weblogic, Iplanet, ATG Dynamo, Broadvision, Ariba Trading Dynamics, MOAI, Idapta, WebMethods, Top-Link, Extricity, Crossworlds, Oracle, Documentum. Vignette, Yantra, Manugistics, CAPS, and custom B2B Portals and Exchanges*

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#### Key Contributions and Achievements:

- **Project Leadership:** Spearheaded multiple IT projects, ensuring they aligned with client objectives and delivered within time and budget constraints. Provided leadership in these projects was instrumental in enhancing client satisfaction and project success rates.
- **Technical Expertise:** Utilized extensive knowledge in Sales Automation Technologies and Platforms (10 years plus two prior IBM roles) to provide expert guidance and solutions. This involved staying abreast of the latest technological trends and effectively applying them to meet project requirements.
- **Client Relationship Management:** Built and maintained strong relationships with key stakeholders, understanding their unique needs and providing tailored solutions. The ability to communicate complex technical concepts to non-technical stakeholders was crucial in securing client trust and loyalty.
- **Innovative Problem-Solving:** Regularly tackled challenging IT issues, employing innovative approaches and

Natural Language Processing (NLP)



Open Source



OS Commerce



Performance Management Software



Provisioning Software



Resource Planning Software



SaaS



Sales Force Automation Systems



SDLC



Sentiment Analysis



Search Engine Optimization (SEO)



Search Engine Marketing



Smart Car Technology





critical thinking. These solutions not only resolved immediate problems but also contributed to the long-term efficiency and effectiveness of client systems.

- **Team Collaboration and Mentoring:** Worked collaboratively with cross-functional teams, fostering a productive and inclusive work environment. Actively mentored junior staff, sharing knowledge and expertise to enhance team capabilities.
- **Continuous Improvement:** Committed to continuous learning and improvement, regularly participated in professional development opportunities. This commitment enhanced personal skills and brought new insights and practices to the team and projects.

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**Skills:** IT Strategy · Change Management · Business Process Re-engineering · Neural Networks · Big Data · Business Intelligence (BI) · Java · Information Technology · Consulting · Architecture · Infrastructure · Analytical Skills · Business Analysis · Software as a Service (SaaS) · Software Development · Program Management · Integration · Strategic Planning · Enterprise Architecture · CRM · Enterprise Software · Market Research · Business Planning · Business Strategy · Business Development · E-commerce · Online Advertising · Project Management · New Business Development · SmallTalk · J2EE

1999-02 -  
1999-09

## Director Internet Consulting and Training

**Navant Corporation: IBM Websphere Business Partner, Raleigh, NC**

### As Director for Internet Consulting and Training:

- Spearheaded the development and marketing of innovative e-Learning solutions, significantly enhancing the digital learning experience for a diverse client base.
- Collaborated with cross-functional teams to design and implement robust e-Learning platforms, ensuring scalability, user-friendliness, and cutting-edge content delivery.
- Played a pivotal role in strategic planning and execution of IBM internal marketing campaigns, effectively positioning Navant Corporation as (1) A leader in e-Learning solutions, and (2) The Premier IBM e-Business Partner

Good

SQL



Strategic Planning Software



Supply Chain Management



Tivoli



Video Conferencing



Visual Programming



Waterfall



WebLogic



IPlanet



ATG Dynamo



Ariba Trading Dynamics



Broadvision



MOAI



Idapta



for WebSphere consulting and Web Integration consulting.

- Sales and delivery of customized 'branded' **Java technical training** to the IBM WebSphere Brand Team, IBM Solution Developer Marketing, and IBM Business Partners that averaged \$40K-\$80K per course (1-5 day), delivered for an additional \$3-5K per day through IBM "e-Learning".

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#### Lecturer, IBM e-Learning (Course E4400)

- Conducted comprehensive lectures and training sessions on advanced e-Learning technologies and methodologies, with a focus on Internet Application Server principles, and transitioning savvy .Net C++ developers into J2EE object models.
- Designed and delivered engaging course content, fostering an interactive and immersive learning environment for participants.
- Utilized expertise in e-Learning, and experience transitioning object-oriented frameworks since 1988, to provide insightful, real-world examples and case studies, enhancing the learning experience for all attendees.

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#### Key Skills and Technologies:

- e-Learning Solutions Development and Marketing
- Cross-Functional Collaboration in Platform Design and Implementation
- Strategic Marketing Campaign Planning and Execution
- Comprehensive Lecturing and Training in e-Learning Technologies
- Interactive and Engaging Content Creation
- Expertise in Internet Technologies, .Net, J2EE, and Online Learning Strategies.

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**Skills:** Learning Management Systems · IT Strategy · Prompt Engineering · Java · Information Technology · Consulting · Architecture · Product Management · Analytical Skills · Account Management · Program Management · Integration · Course Development · Software Architecture · Object Model · Industry standards · Service-oriented Architecture (SOA) · Web services · .Net · C++ · Application

Very Good

WebMethods



TopLink



Extricity



Crossworlds



Vignette



Yantra



Manugistics



CAPS



Small Talk



UML



Catalyst



Lotus Notes



## Languages

English



Servers · Course Delivery · Case Studies · Visual Age ·  
Webcasting · eCommerce · Project Management · Linux

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*Note: John was the IBM Engineer who wrote the White Paper and Strategy papers that launched the IBM WebSphere family of products, except for MQ (the 'glue') and Tivoli, which were already well-established.*

1998-04 -  
1999-01

## Vice President – Internet Strategy

***AON Consulting (US Corporate – Division of AON Group), Winston-Salem, NC and Chicago, IL***

**AON is a acquisitions-based company** meaning that as a large player in the insurance industry, they constantly buy and often sell companies later. They acquire to gain market share, but often the costs of integration and rebuild are so high they make the acquisition profitability questionable.

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### As Vice President of Internet Strategy:

- **Provided expert consulting services to AON, a leading global professional services firm offering reinsurance, risk, retirement, and health solutions (HR and benefits administration).** My role involved direct engagement with AON's diverse client base, delivering high-impact solutions tailored to their unique needs.
- Led a team in the development and implementation of innovative strategies to optimize AON's service offerings, enhancing client satisfaction and operational efficiency.
- Played a key role in analyzing market trends and client feedback, ensuring AON's services remained at the forefront of the industry.

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### Key Responsibilities and Achievements:

- **Developed and executed comprehensive strategies to improve client engagement and service delivery, resulting in increased client satisfaction and retention.**
- Collaborated with cross-functional teams to identify and implement process improvements, driving efficiency and effectiveness in service delivery.

Excellent

French

● ● ● ● ●  
Good

Japanese

● ● ● ● ●  
Basic

- Conducted in-depth market analysis to stay ahead of industry trends and align AON's offerings with emerging client needs.

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#### **Key Skills and Technologies:**

- Strategic Consulting and Client Engagement
- Team Leadership and Cross-Functional Collaboration
- Process Improvement and Operational Efficiency
- Market Analysis and Trend Identification
- Service Delivery Optimization

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**Skills:** IT Strategy · Change Management · Business Intelligence (BI) · Information Technology · Consulting · Architecture · Analytical Skills · Program Management · Integration · Strategic Planning · Enterprise Architecture · CRM · Enterprise Software · Business Planning

1996-04 -  
1998-02

### **Worldwide Architecture Assessment Program Manager**

***IBM Sales And Service, Raleigh, North Carolina***

This strategic role's responsibility focused on **conducting comprehensive assessments of IBM's multi-billion-dollar portfolio of internal applications and services**. The expertise required was decisive in evaluating various lines of business, identifying areas for improvement, and making critical recommendations.

- **Applications and frameworks assessed included** business partner programs, sales automation, product configurators, project management, enterprise middleware, push and search technologies, executive information systems (EIS), OLAP, data warehousing, OLTP, ERP systems, contract and proposal generators, video conferencing, application internationalization and internet distributed computing designs.

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#### **Key Responsibilities and Achievements:**

- Conducted in-depth assessments of IBM's internal services, analyzing their performance, scalability, and alignment with business objectives.

- Provided expert recommendations on a range of actions, from sunsetting underperforming services to advocating for additional funding for promising initiatives.
- Played a key role in shaping the strategic direction of IBM's internal services, influencing decisions on technology investments and business development.
- Authored multiple White Papers that provided insights into technology trends and internal service optimization, guiding IBM's strategic planning.
- Provided business and technical insight for integrating application frameworks, standardizing enterprise infrastructure, and streamlining migration, based on emerging Internet trends, IBM "net. compute" directives and IBM's enterprise 'meta-object' research. This **initially** established **the unified, industry standard architecture** (Java, SOA and Web Services) that became **the foundation for IBM's internal and external application frameworks for WebSphere e-Business**, e.g., WebSphere Application (integration) Server, MQ-MQSI (messaging, pub-sub), DB2 (data and virtualization), and Tivoli (storage-access-identity).
- Member of the Senior Corporate Object-Oriented Analysis Team (IBM CIO internal Intellectual Capital) which then, **publicly presented the CORE business and service 'meta-object'** models and **underlying publish-subscribe "services"** that (in tandem with Microsoft development) became **the foundation of today's Web Services** and the **CORE objects** of most vertical application frameworks. The result was an in-depth study deemed ***"the most valuable and insightful study ever produced by IBM IT"***, as documented by IBM's USA CIO and their intellectual capital CIO staff.

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**Skills:** AI Chatbots · IT Strategy · Change Management · Business Process Re-engineering · Neural Networks · Expert Systems · Pattern Recognition · Big Data · Business Intelligence (BI) · Prompt Engineering · Natural Language Processing (NLP) · Java · Information Technology · Consulting · Architecture · Product Management · Infrastructure · Analytical Skills · Business Analysis · Software as a Service (SaaS) · Account Management · Software

Development · Program Management · Integration · Strategic Planning · Enterprise Architecture · CRM · Enterprise Software · Market Research · Business Planning · Business Strategy · Business Development · E-commerce · Online Advertising · Project Management · New Business Development · Project Management · Cost Justification · Investment analysis · Competitive analysis · Meta Objects · Web services · Decision Sciences · Managed Services · Product Configurators · Profit and Loss analysis

1993-09 -  
1996-04

## **Chief Technology Officer and Sales Transformation Architect**

***IBM Sales Force Transformation, Bethesda, MD***

**Defined and led the full cycle IBM Sales Force Transformation Business and Technology Services Plan to Market:** Business analysis, business plans, funding, identification, sourcing, plans to develop, the development, packaging, quality assurance, securing general availability, software remarketing, best practice deployments plans, and alliance-acquisitions plans, ensuring alignment with business goals and market trends.

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### **Key Responsibilities and Achievements:**

- Strategic White Paper – *“Capturing the Sales Automation Market - a Business Proposal”*.
- Oversaw the research and development of new technologies, fostering innovation and maintaining IBM's competitive edge.
- Design and product manager for multiple sales-force automation products.
- Established and enforced technical standards and practices across the national practice, enhancing efficiency and consistency in technology deployment.
- Collaborated with cross-functional teams to integrate technology solutions into IBM's product offerings, enhancing value and customer satisfaction.
- Acted as a key advisor to senior management on technology-related decisions, influencing the company's strategic direction and investments.

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### **Key Skills and Technologies:**



- Technology Strategy Development and Implementation
- Leadership in Research and Development
- Technical Standards and Best Practices Establishment
- Cross-functional Collaboration and Integration
- Strategic Advisory and Decision Making

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**Skills:** IT Strategy · Change Management · Business Process Re-engineering · Neural Networks · Expert Systems · Pattern Recognition · Big Data · Information Technology · Consulting · Architecture · Product Management · Infrastructure · Analytical Skills · Business Analysis · Software as a Service (SaaS) · Account Management · Software Development · Program Management · Integration · Strategic Planning · Enterprise Architecture · CRM · Enterprise Software · Market Research · Business Planning · Business Strategy · Business Development · E-commerce · Project Management · Ami Pro · Lotus Notes · Lotus 1-2-3 · Business Resource Software · Wireless Consulting · Product Configurators · Quality Assurance · General Availability · Release Planning · Sales Automation · Mobility · Laptop · Sales Transformation · Video Conferencing · Decision Sciences · Cost Justification · Communication Technologies

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*Note: IBM recruited my services after winning multiple contracts in competition with them in my prior role at Spectrum Information Technologies.*

1993-11 -

1995-02

## Principal and Partner

***Synergyn Inc., Silver Springs, MD***

**Concurrent to the launch of IBM first website on the public worldwide web** (that launched in 1993), as a principal of Synergyn Inc.:

- Spearheaded the development and launch of an innovative ancestry application website, leveraging extensive experience in sales automation dating back to 1975.
- Pioneered the use of non-IBM technology for web development and promotion, demonstrating foresight in Internet marketing and digital presence.
- Played a key role in the introduction and marketing strategies for the website, setting a precedent in online user engagement and digital ancestry exploration.

- Navigated complex corporate dynamics, balancing the pioneering work at Synergrn with responsibilities as IBM's Chief Technology Officer.
- Developed and implemented UI Frameworks, effectively building, and managing the website's infrastructure, which in modern terms equates to comprehensive web-site development.
- Faced and addressed corporate challenges, leading to a pivotal career decision due to conflicting interests with IBM's emerging web presence.

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#### **Key Sales Automation Technologies and Tools applied:**

- Web marketing with a games/web interface
- Information/needs analysis
- Configurators
- Competitive purchase analysis
- Alternative payments plan.
- Clean order validation
- Order processing and tracking
- Focused (targeted) web site promotion strategy.

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**Skills:** Information Technology · Consulting · Analytical Skills · Web site development · Program Management · Marketing · Business Planning · Email Marketing · Lead tracking · HTML · Sales Tracking

1991-02 -  
1993-09

### **Director of Software Development**

***Spectrum Information Technologies, Monmouth Junction, NJ and Manhasset, NY***

**Directed the planning, design, and development of sales automation platforms and wireless (cellular and pager) technology implementations for Spectrum.** Spectrum-DataOne was the largest US distributors of laptops at that time, a leading multi-vendor VAR, the leading developer in "field force sales automation" (sales supply chain automation for consumer goods vendors), a large CellularOne (cellphone) distributor, and holder of the 1st US cellular to pc patent.

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**As Managing Director for Software Development:**

- Led multiple groundbreaking projects that integrated laptops with cell phones, leveraging the first cellphone-to-PC **patent**, at a time when mobile technology was in its **nascent** stages.
- Developed **one of the world's first AI-assisted sales engineering workstations**, revolutionizing the speed and efficiency of custom build-to-order quotes in the technology sector.
- **Utilized AI capabilities** to **access manufacturing engineering and order databases**, along with a **comprehensive aggregation of global engineering notes and analyses**, enabling rapid, informed decision-making.
- Facilitated the design and scheduling of custom builds with unprecedented speed, significantly outpacing competitors in response time and efficiency.
- Managed a project that was crucial for a major Unisys spin-off, a leader in high-speed private network backbones, marking a significant achievement in the tech industry.
- Achieved a remarkable milestone where ***the client's CFO documented a full return on investment (ROI) in less than 9 months, validating the immense value and impact of the implementation.***
- Played a pivotal role in the national launch of this workstation, which was a key factor in the cost-justification of the client's investment, including (the cost of) their national convention for field sales engineers to launch the application.
- **Enabled co-development with Skytel to provide a message-based offering**, leveraging their satellite-based pagers in place of cellphones (using our patent) to provide the only worldwide digital coverage (at very low costs). Note that Motorola's first-to-market, Iridium satellite phone sales launched in 1998, at a cost of ~\$3,000.

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#### **Key Technologies:**

- Laptop Provisioning and Service - primarily Compaq and Toshiba
- Sales Automation: Sales Tracking, Configurators, Order Processing, and Content Aggregation

- Wireless - Cell Phones, Long Distance Pagers (Skytel), and the first cellphone-to-PC patent.
- AI: Decision Support Technologies, a Cambridge intellectual spinoff that developed expert systems and AI-assisted applications to supplement their core business as providers of Management Consulting, Systems Development and Executive Education.

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**Skills:** IT Strategy · Change Management · Business Process Re-engineering · Neural Networks · Expert Systems · Big Data · Prompt Engineering · Information Technology · Analytical Skills · Software Development · Program Management · Integration · Enterprise Architecture · CRM · Enterprise Software · Market Research · Business Planning · Business Development · E-commerce · Project Management · Laptop · Technical Support · Pager Technology · PC to Cellphone · Analog Cellular

1988-08 -  
1991-01

## Group Product Manager, Sales Automation Development

***Reality Technologies Inc. (Reuters), Philadelphia, PA***

**Reality Technologies was the intellectual and business brainstorming company** that arose from members of the Wharton Business School and drew upon the best business, creative and programming talents from the University of Pennsylvania, Drexel University and Temple University (home of basketball greats like Shaquille O'Neal) in Philadelphia.

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They created "WealthBuilder by Money Magazine", the market predecessor to products like Microsoft Money, that created a ***user-friendly custom "optimized diversified portfolio" by subscription, leveraging consolidated deep investment data*** for the mutual funds markets (typically only privy to brokers then).

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Backed by **free advertising** in all Money Magazine media channels (including Time magazine), **free financial expert content** for their help guides and investment tutorials, and with **great business animated graphics** (from one of the

industry's top business game designers), they sold 27,000 copies first year with no sales staff.

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As Group Product Manager for sales automation to the financial markets:

- **Led the design and management of pioneering sales automation projects for the financial markets, focusing on integrating advanced sales technologies with the WealthBuilder product** to enhance value and efficiency. Our first client was the world's largest insurance and investment company.
- Managed the collaboration of 8 C++ developers and designers, to build a comprehensive sales automation system encompassing **lead generation, sales tracking, order processing, and product demonstrations**, tailored specifically for the financial sector, starting with the insurance market.
- Played a crucial role in integrating WealthBuilder, a groundbreaking investment planning tool, into the sales automation system, thereby providing a unique and compelling value proposition to clients in the financial industry.
- Collaborated closely with the WealthBuilder team on critical database integration challenges, aiming to create a unified and efficient system that would benefit both the sales automation and WealthBuilder platforms.
- Co-designed this integration effort which represented a significant innovation in sales automation, combining sophisticated financial planning tools with state-of-the-art sales processes, setting a new standard in the industry.
- **Faced and tackled extraordinary technical challenges, particularly in database synchronization, which pushed the boundaries of existing technology and required innovative problem-solving skills** (P=NP, e.g., Find the most cost-effective estimation for the solution, given that the exact answer requires a quantum solution from the number and complexities of factors involved).
- Regularly met with financial planners, bankers, insurance, and investment consulting firms, seeking similar financial sales automation solutions.

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The project's outstanding success demonstrated a unique ability to blend complex financial applications with advanced sales automation techniques, creating powerful tools for the financial services industry.

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**Skills:** IT Strategy · Expert Systems · Information Technology · Architecture · Analytical Skills · Account Management · Program Management · Integration · Strategic Planning · Enterprise Architecture · Enterprise Software · Market Research · Business Planning

1987-01 -  
1988-07

## **Partner, Sales Automation Consultant**

***Kingswood Communications (division of Kingswood Group) and ASTI Inc., Ardmore, PA***

**Kingswood Communications was a book publisher and full-service advertising agency**, located in Ardmore, PA (a suburb of Philadelphia). Using multiple Heidelberg presses, they became the area's first electronic publishers.

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### **As a Kingswood partner and consultant:**

- Secured a pivotal role at Kingswood following a successful partnership with Applied Sales Techniques, leveraging expertise in sales automation and digital technology.
- **Was instrumental in orchestrating a trial offer for NewsNet, an early pioneer in digital news distribution, which resulted in a highly successful campaign and marked a significant achievement in digital news dissemination.**
- My involvement with Kingswood was a direct result of a prior partnership with a renowned west coast technology entrepreneur and author of Philosophy, whose book publisher owned Kingswood. This unique connection facilitated the acquisition of half of my interest in Applied Sales Techniques by Kingswood.
- **Played a key role in supporting Kingswood's advertising agency department, contributing to the publication of major directories including Yellow Pages and Blue Cross and Blue Shield directory publications.**
- **Developed an approach characterized by a blend of innovative sales strategies and a deep understanding of**



**digital media**, which were crucial in driving the success of the NewsNet trial and other advertising initiatives.

- Demonstrated a unique ability to adapt and apply sales automation principles to the evolving digital landscape, significantly enhancing the reach and effectiveness of Kingswood's advertising and publication efforts.
- Implemented capabilities that included **lead generation and qualification, telemarketing, survey and seminar development, segmented literature fulfillment, domestic and foreign distribution support, a strategic 'event-processor', field sales support, response tracking, automatic multilevel reporting, and marketing performance analysis.**

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**Skills:** Information Technology · Consulting · Analytical Skills · Software Development · Program Management · Marketing · Business Planning · Integrated Marketing · Lead Generation · Account Management · Typesetting · Desktop Publishing

1986-01 -  
1986-12

## **Marketing Development Consultant and CEO**

***Applied Sales Techniques, Inc., San Francisco, CA***

**Applied Sales Techniques Inc. was one of the first sales automation companies, based out of San Francisco, CA in 1986.** Founded Applied Sales Techniques, a trailblazer in integrating Direct Response Marketing with response tracking, offering a service that was ahead of its time in the industry.

**Partnered with John David Garcia, a renowned author, inventor, and multi-million-dollar entrepreneur,** in multiple ventures that combined innovative technology initiatives with ethical business practices. 'Google' his name for his books which include ***"Creative Transformation"***, ***"The Moral Society: A Rational Alternative"***, and ***"The Ethical State – An Essay on Political Ethics"***.

- Played a pivotal role in "Computer Bargains," an early reseller of clone PCs, contributing to the growth and success of John's pioneering technology venture.

In this year, John's patent of the *"Electronic Signature Lock" was the world's first biometric identity verification application* based on each person's unique typing pattern, between keystrokes and pressure on the keys. The target customer was the National US Archives in addition to other government security applications.

- Engaged in creative brainstorming and strategic planning within Garcia's commune, fostering new technology initiatives and attracting prospective investors.

*Gained invaluable experience in ethical investment practices, learning the importance of responsible partnership and investment decisions, particularly in high-risk ventures.*

- Developed and executed highly personalized direct marketing campaigns, leveraging cutting-edge sales automation technology to achieve unprecedented levels of productivity and efficiency. One contract with a prominent west coast banking network (Bank of America), for a custom direct response program, resulted in over 300 new business accounts in the first 90 days (3X the response rate of their competitors).

The parameters of that campaign included (1) Custom printed envelopes (vs. using stickers), (2) handwritten signatures, (3) sophisticated multiple insertions in the letters based on two-three levels of logic, (4) custom inserts per mailer, (5) coordination with Bank of America's computer mainframe outputs, and (6) stamped and delivered to Bank of America's postal services. Note: the envelopes and custom signatures were the key features that no other service firm, at the time, was willing or capable of doing. Production was 800 letters per day.

This tenure at Applied Sales Techniques was marked by a unique blend of technological innovation, marketing acumen, and a deep commitment to business integrity, significantly influencing the evolution of direct marketing strategies.

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**Skills:** Information Technology · Consulting · Product Management · Analytical Skills · Business Analysis · Software as a Service (SaaS) · Software Development · Marketing · Integrated Marketing · Lead Generation · Project

Management · New Business · Identity · Security · Venture Capital · Business Ethics · Morality · Creative Thinking · Biometrics

1985-01 -  
1985-12

## Northwest Regional Sales Manager

*Digital Microsystems, Inc., Alameda, CA*

**Digital Microsystems (DMS) was one of the first multi-user computer systems.** They also supported a limited number of multi-user applications (e.g., WordStar – the predecessor of Word, Spreadsheets (VisiCalc), and multiple accounting systems (Peach Tree).

- **Pioneered the integration of advanced sales automation technologies at Digital Microsystems, significantly enhancing sales processes and operational efficiency.**
- Led a team of skilled professionals in designing and deploying innovative sales automation solutions, tailored to meet the dynamic needs of the business.
- Instrumental in automating key sales functions, resulting in streamlined operations, improved accuracy, and increased sales productivity.
- Collaborated closely with cross-functional teams to ensure seamless integration of sales automation systems with existing business processes and technology infrastructure.
- Continuously monitored and evaluated the performance of sales automation systems, making strategic adjustments to optimize effectiveness and meet evolving business requirements.
- Fostered a culture of innovation and continuous improvement, encouraging the exploration of new technologies and approaches to enhance sales automation capabilities.
- **Responsible for direct Northwest regional sales and business development with 2 direct reports. DMS was the primary contractor to British Telecom and Lockheed.**
- Established a national marketing development program for major accounts, dealers, OEMs, and VARs. This facilitated territorial assignments, lead distribution, lead tracking, and collaboration that significantly increased

the number of working accounts per rep. The result: 20% sales cost reduction, and 300% increase in sales.

- In late 1985, the company was acquired by its' largest distributor in England for the British Telecom contract and became the major competitor to Apricot Computers. The manufacturing moved to England shortly thereafter.

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**Skills:** Consulting · Business Analysis · Account Management · Marketing · Market Research · Business Planning · Integrated Marketing · Lead Generation · New Business · Sales · Sales Management · Territory Management

1984-01 -  
1984-12

## **Manager of Client and OEM Technical Support**

***Vector Graphics, Inc., Thousand Oaks, CA***

As **Manager of Client and OEM Technical Support Services**, this pivotal role managed the engineering support team at **Vector Graphics**, one of the last full-line manufacturers of practical business computers, known for their comprehensive suite of software applications. They produced their own 3-5-layer motherboards and S-100 boards for OEM engineering applications. Competing with IBM's bulky System 36 (8-inch floppy drives) for big businesses, VG systems often served as controllers for Cray Computers.

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### **The Journey and Contributions:**

- **Recruited by senior staff at Vector Graphics due to exceptional performance in a previous role**, which demonstrated expertise in troubleshooting and supporting multi-user computer systems.
- Directed staff of nine engineers providing hardware and programming support to major clients and OEMs.
- **Took over a chaotic situation when workforce was reduced by 50%, but developed a network Warranty and Call Tracking system which reduced the response time average from 4 to under 1 hour.**
- Specialized in modifications and troubleshooting of Peachtree and Accounting Plus applications, enhancing their functionality and reliability for business use.

- Contributed to the deployment of Vector's first multi-user computer systems, setting a benchmark in the industry for performance and usability.
- Provided comprehensive technical support and guidance to clients, ensuring optimal utilization of Vector's computer systems and software applications.
- Fostered strong relationships with clients and colleagues, built on trust, expertise, and a commitment to delivering high-quality solutions.

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**Skills:** Product Management · Infrastructure · Analytical Skills · Program Management · Integration · Team Management · Accounting · Technical Support · Hardware Engineering · Account Management · OEM Support · Software Development · Manufacturing Inspection · Quality Assurance · Firmware

1982-01 -  
1983-12

## Sales Engineer

*Mathematica and Martin Marietta Data Systems, Princeton Junction, NJ and Greenbelt, MD*

**Mathematica was a leading research and development firm and renowned programming powerhouse** (developers of **RAMIS II**, the leading IBM Mainframe database at that time) for their corporate and government clients. The company was **acquired in early 1983 by Martin Marietta Data Systems** (MMDS, today as Lockheed MMDS), a major Government Defense Contractor and programming resource.

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### Mathematica (Before Acquisition by MMDS)

- Promoted from the Philadelphia regional sales department, where my department was one of the most profitable for the company.
- **Trained in multiple levels of hardware troubleshooting and maintenance for Vector Graphics, Mathematica's system of choice** as the world's first business computer vs. the IBM System 36. Leveraged this training to contribute to many groundbreaking projects, driving technological advancements.

- **Assessed all software for the corporation**, while learning approximately 100 primary and secondary applications to support Mathematica's many clients.
- Collaborated closely on projects for well-known clients such as LSAT, TRW, Rudgers University and Fortune 500 firms, utilizing Mathematica's advanced computing capabilities.
- Engaged in diverse projects, demonstrating versatility and the ability to adapt to various technological and industry demands. Two examples follow.
- Played an essential role in the maintenance of FAA's critical maintenance records, ensuring accuracy and reliability in aviation safety.
- Instrumental in the launch of the first credit card promotional program based on credit scores, setting a precedent in the financial industry.
- Helped Vector Graphic troubleshoot their 'market first' multi-user design.
- Contributed to Mathematica's reputation as a leader in Research and Development (programming), particularly before its acquisition by Martin Marietta Data Systems.

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#### **Mathematica (After the Martin Marietta Data Systems Acquisition):**

Post-acquisition played a pivotal role in Mathematica's transition and expansion, particularly in its engagement as a major grey marketer of IBM hardware.

- **Instrumental in Mathematica's strategic shift from a resolute Vector Graphics user and reseller to embracing IBM PC offerings**, aligning with MMDS's broader business objectives.
- **Leveraged Mathematica's multiple roles as a user, reseller, VAR (Value-Added Reseller), and VAD (Value-Added Distributor)** to establish it as a significant grey marketer in the IBM hardware space.
- Facilitated the company's transition to IBM PC products, capitalizing on the diverse corporate income streams from various channels.
- Contributed to the diversification and expansion of Mathematica's business model, aligning with MMDS's vision and market positioning.



- Played a key role in navigating the company through the complexities of the acquisition, ensuring a smooth transition and integration of business operations.
- Maintained a focus on innovation and technological advancement, adapting to new market trends and demands in the post-acquisition landscape.

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**Skills:** Information Technology · Consulting · Product Management · Lead Generation · Project Management · Functional Analysis · Sales · Account Management · Hardware Installation · OS Diagnostics · Technical Support · Customer Support · Software Research · Inventory Management · Burn in · Quality Assurance · Hardware and Firmware Diagnostics · Version Control · WordStar

1979-01 -  
1981-12

## **Mid-Atlantic Asst. Regional Sales Manager**

***Gulf Development Inc., Philadelphia, PA***

### **Gulf Development - Lexan (Bullet Proof Plastics) Sales**

Engaged in the specialized field of plastic sales, focusing on Lexan, a renowned bullet-proof plastic, while honing professional sales skills through the study of industry-leading techniques.

- Spearheaded sales initiatives for Lexan products, a high-grade bullet-proof plastic, catering to a niche yet critical market segment.
- Employed advanced sales strategies and techniques, studying, and implementing methods from renowned sales experts of the time, including ***Dale Carnegie, Charles B. Roth, Arthur C. Douglas, and Paul McCalli.***
- Played a key role in expanding the market reach for Lexan products, identifying new opportunities and applications in various industries.
- **Trained (class and field) and managed a 35 man, 5-state region.**
- **Served as contract negotiator for the Eastern US,** reporting to the Executive Vice President of Marketing.
- Promoted from sales to sales manager to Assistant Regional Manager.
- Specialized in ' **One Call Close** ' sales techniques.

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**Skills:** Account Management · Program Management · Business Strategy · Business Development · Lead Generation · New Business Development · Sales · Sales Management · Territory Management · Sales Training · Sales Techniques · Sales Closer · Sales Negotiation

1975-09 -  
1977-08

## **Recruiter, Sales Rep and Executive Chef**

***Continental Business Consultants, Home Renters Inc., and 3-Star Hotels, Philadelphia, PA***

This represents the period between my undergrad and graduate education, extending work experiences which funded my undergrad education, transitioning from hard sciences to business. This included:

- Served one year as an employment agency recruiter for Continental Business Consultants. That was challenging as agencies then either 'talent poached' (e.g., Linkedin.com or personal networking today), or charged most applicant responding to newspaper ads, a fee for services while maintaining compliant with employment law.
- Served one year promoting information services for Home Renters, Inc. This service aggregated listings from local hard publications, sorted by area and bedroom size. Available at one of multiple area offices, updated daily, along with unpublished listings and rental contract conditions, this optimized the chance to acquire a new residence quickly. It was a feat that today is merely a web search, except for unpublished listings – the realm of managed screening services. This was one of the earliest uses of computer services.
- Concurrently served one year as an Executive Chef for a 3-star area hotel, after a year tutelage under a renowned CIA (Culinary Institute of America) graduate, Executive Chef Roy Nagel. This came after 2 years in college ('72 – '74) in Philadelphia area restaurants serving in numerous roles covering all components of fine dining, banquet services, and fast foods.

While these experiences motivated my return to Wharton thereafter, little did I realize then that adjusting for changes since some of those skills would be beneficial to a career in business, IT and AI consulting.

**Skills:** Sales techniques – Talent poaching – Personal networking - HR Standards – HR compliance – Information publishing – Restaurant Management – Chef trades

(breakfast, prep, butcher, baker, banquet, gourmet dining – Ice Carver) – Budgets – Scheduling – Forecasting - Inventory Control - Maintenance – Food standards - Customer relations – Employee relations – Managing conflicting interests

## Education

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1977-08 -  
1979-05

**MBA Candidate, 2 years credit; Wharton Graduate School of Business, University of Pennsylvania; Strategic Planning and Decision Sciences**

***Wharton Graduate School of Business - Philadelphia, PA***

**Objective: Master of Business Administration and Science**

I was accepted into the Wharton Graduate School of Business, another part of the University of Pennsylvania, extending my earlier 5-year accelerated undergrad program, to obtain an MBA.

- This occurred immediately following 2 years of sales experience, following my earlier attendance at the university's medical technologies extension school.

During those 2 prior years I had been engaged in extensive self-education on many facets of Business Administration, Operations, and Sales Management.

My focus in returning to school centered around Strategic Planning and Decision Sciences supporting Finance, areas which Wharton was renowned for their concentration in finance. This seemed a strategic choice in comparison to attending Sloan, Harvard, or Stanford (marketing concentration), as *finance is the backbone for successfully applying these sciences.*

- The education and insights I received were valuable, but in hindsight prone to just incorrectly predicting the future, based on *the advancement of technology, its' influence on society, and the unstable nature of trends.* Specifically, I remember attending a lecture by well-regarded political authority who stated emphatically that **"You can bet on the fact that there will never be a black man in the White House".** *In hindsight I learned*

*not to rely on predictive analysis of past events, as compared to similar analysis of current events and emerging, yet unstable future trends. Applying predictive analytics blends psychology, the stages of innovation adoption, and effective channel marketing.*

- Unable to support an education that for graduate and undergrad schools at Penn, ran over \$50,000 per year in 1972-1979, I ended my studies and established the work experiences listed in this resume.

1974-08 -  
1975-06

**Bachelor of Science Candidate, Biotechnology, 1 Year  
Undergrad Credit: Hematology and Urinalysis**

***School of Medical Technology, University of Pennsylvania - Philadelphia, PA***

**Objective: Associate of Science - Biotechnology**

Shifting my focus targeting a medicine career, I attended the University of Pennsylvania's Medical Technology extension program. There I focused on biotechnology associated with Hematology (the study of blood) and Urinalysis (the study of pee).

- Based on my coursework in Hematology, my interest in medical research, and my unique understanding of Organic Chemistry and Physics principals, I received endorsement for a summer internship as a Hematology Researcher, serving under the leading worldwide authority on Sickle Cell Anemia (Shlomo Friedman), stationed at Children's Hospital in Philadelphia.

While part of the work involved field visitations, with the doctor, collecting over 2000 infant blood samples, my main charge was to analyze these blood samples, and identify potentially valuable **patterns of abnormalities**. My analysis findings came as "**shock**", when this research uncovered *the proven potential to eliminate over 95% of heredity-based diseases by the early detection of specific related 'indicators' in infant blood samples.*

This disease, like most others based on heredity, has well-documented evidence supporting the future health benefit, provided that the disease can be identified, and early treatment applied, before it manifests into the disease's harmful state.

This potentially invaluable finding (unfortunately) was not well received by the head of the Philadelphia Children's hospital, fearing the potential backlash from the

greater medical community, related to reducing the growing job market for medical professionals. I was subsequently terminated, and rehired, but *that was the social medical climate in 1974-1975.*

This second run-in with the state of science then frustrated me, and I went full-time into the roles that had funded my undergrad education. For three years after, before returning to grad school, I led a lifestyle of being a hotel Executive Chef, and a professional salesperson that included *serving one year as an employment agency recruiter, and a year selling information technology services for renters* (not listed in this resume).

1972-08 -  
1974-05

**Bachelor of Science Program, Arts and Sciences, 5  
Year MBA Program: Advanced Mathematics, Physics,  
Chemistry, French, and Sociology**

***University of Pennsylvania - Philadelphia, PA***

**Objective: Bachelor of Behavioral Science**

- **Physics and Chemistry:** My chemistry professor and physics professors were both Nobel Prize winners, and *I was a prodigy of the physics professor, John Robert Schrieffer.*

Combining a usual understanding of physics, *my Organic final test was based on using Quantum Mechanics instead of standard memorized reactions to solve the answers.* At first, my exam was failed, as even the Chairman of the Organic Chemistry department couldn't grasp *my perception linking physics and chemistry, was the concept known today as entropy, e.g., the measure of disorder in a physical system; applied then as the (predictive) molecular movement (reaction) corresponding to organic molecular quantum mechanics.*

Confirmed by my (Nobel Prize) physics professor, the exam results were approved, but only at a B+ rating, based on the *rationality* that standardized testing for organic chemistry was based on memorized lessons and reactions, versus applying radical methodology.

Twenty-five years later, I found out that in 1972 (a year after I had the exam), a *closely related patent was filed under the title "Magneto Hydrodynamics" which won a Nobel Prize, setting the precedent for entropy.*

John's lectures were held at an underground facility (for containment purposes) 30 feet below the mid-center of the Schuylkill River bridge; supported by multiple private and public industry research groups. I was fortunate to be in attendance *the day John was notified of his Nobel Prize award for Superconductivity*. Many close discussions followed as he became aware of my father's pending patent on '*High Temperature Superconductivity*'.

His influence in hindsight marked the beginning of a life journey, *recognized the patterns and inter-connections that emerge from the convergence of science disciplines. It's the key for innovation (reverse engineer the future) – to find what you didn't know that you didn't know, to assume nothing, but plan for everything, that makes the seemingly impossible happen, transforming business and society*.

- **Sociology:** The official 'degree' submitted was originally to be for a "Sociology of Medicine, Bachelors of Science Degree" most influenced from attendance of Anthony Campolo's Sociology lectures, a professor at the University of Pennsylvania, one of the two leading Sociological educational authorities worldwide, and *Official head of the American Baptist Churches*, which influenced his role as *tax administrator for the Pennsylvania Amish Community* (who economically offset the US education's contemporary ruling for attendance after age 16, and refused to pay taxes as a land owner. Serving as owner for tax purposes relieved their social conscience to not pay taxes but pay Anthony as tenant farmers).

Frankly, *Anthony lectures sounded more like religiously inspired unofficial research dating from pre-history-post-observations to the emerging philosophy to psychology transition*. It all made sense, until one lecture I attended years later at Wharton Grad. displayed the fallacy possible regarding racial bigotry. *Twenty years later*, pressured by the media and his wife, he *radically changed many of his viewpoints*, best exemplified by his full acceptance of Gay and Lesbian Christians.

- **Pharmaceutical Test Participant:** During my down time at the university, I was a short-order cook for two



campus restaurants/bars in the evenings, and a business street salesperson for cosmetics during the day. During school hours, while involved in an accelerated curriculum (attempting 2x the number of credits), I took advantage of the highly paid medical research for psychological pharmaceuticals. It should be noted that in 1972, there were few restrictions as the Controlled Substance Act was only formed in 1970.

1969-09 -  
1972-06

## **2 Years Advanced Placement College Credits: Math, Chemistry, Acknowledgements, and Achievements**

### ***University of Pennsylvania - Philadelphia, PA***

This placeholder serves to detail the 2 years of University Advanced Placement credits awarded from the University of Pennsylvania upon my enrollment August 1972, along with other noteworthy experiences and acknowledgements, which influenced my subsequent business, technological and social interests, and future career choices.

- **Computer Science (CS):** Since 1969 enrolled in an advanced 2-year educational curriculum, I studied *Basic, Fortran, Cobol, and Assembly*. This was the paper-punch/tape days using a Dec LA 120 terminal tied to a mainframe over a phone using a 120k baud acoustic coupler. I programmed many games and was a support admin for the high school's records. No college credits were awarded for these studies as no advanced placement testing existed in 1972 for the emerging field of Comp Sci.
- **Mathematics, Physics, Chemistry, English:** *I was taught Calculus at age 14*, influenced by my father, a renowned 35 year nuclear physics scientist for General Electric, with 28+ key patents including ones for 'high temperature superconductivity' and 'underground long distance wiring', Masters from Stanford (Electrical Engineering, Mathematics), Bachelors from San Jose State (Physics, Chemical Engineering), survivor of the 442nd US Army Regiment, worldwide industry physics and electrical engineering expert, reporting to Thomas Lee, GE VP, Chairman of the *MIT Physics Department* and Chairman, Physics for the *Worldwide Energy Council*.

For my 2 years advanced curriculum I received 2 years credit.

- **Junior JACL - Japanese Americans Citizen League:** I was *socially conscious since 1968*, notably influenced from my father's conflicted social past and professional current circumstances. I was Vice President of the Philadelphia Chapter, *charged with helping 2nd and 3rd generation Japanese Americans deal with social acceptance and identity issues.*
- **Boy Scouts Assistant Scoutmaster:** I reported to James McNair, having attained my Eagle Scout rank within one year. My term was also influenced by my father's representation as a board member on the Boy Scout's Valley Forge Council.
- **Quaker; Merion Meeting, Philadelphia:** A key influence regarding *human slavery, equal rights, peace, education, prisoner treatment, and mental health* references my attendance at the Merion Meeting House, related to the founder of the Quaker-based Pennsylvania, namely William Penn. *This was the initial foundation of my ethics background.*
- **Japanese Shodokan Karate:** Our family sponsored the first Aikido Master to the US, and was a close family friend of Sensei Teriyuki **Okazaki**, 10th Degree, Official Japanese Representative to the US, who trained the Philadelphia police and neighboring cities from his main practice in Philadelphia (with sub-practices across the US). He was supported there by Sensei Katsuya **Kisaka** (worldwide speed champion) - another family friend, who was charged by my grandmother to train me like a samurai. That meant no advancement for US marketing purposes, *regular beatings, and switching my brown belt for a white belt when entering competitions.* The result: morally disgracing competitive overly confident Black belts.
- **1972 Army Enlistment:** Until 1972, the war in Vietnam was an overriding concern for me, related to (1) my father's extremist viewpoint from his US Loyalty Oath and 442nd experience, (2) my role as an Shodokan Karate instructor, (3) filing as a "conscientious objector" for the

next military draft, related to (4) my Quaker upbringing which would not allow me to fight, per se, and (5) my closest cousin who was a well-known anti-war social advocate. The plan was to become a field medic which brings its' own share of risks. Fortunately, my number was 250 (out of 365) which meant that I didn't have to enlist and rather could go on to college.

- **Science Fairs:** I was often the leading winner in local science fairs since grade school, presenting advanced proven science in clear and simple terms. Both the sciences presented as well as the art of simple explanations were closely related to my father to be frank. Aside from helping me select key science principles which influenced some of the greatest technological advancements in history, his philosophy is best reflected in his statement that *"the greatest scientists can teach what they preach"*.
- **What's in my name:** I was born in Schenectady NY, near the nuclear particle accelerator which was my father's former lab at General Electric (Rensselaer Polytechnic). Shortly after, we moved to Boxford, Massachusetts where my parents designed and built their first home. My middle name Rowland was in honor of a local New England Puritan preacher, Reverend Rowland, characterized for his colorful and vibrant deliveries. During my early years in sales, I was reputed to talk (and think) like a preacher. In hindsight, the complex technologies of the 1980's were the driving force for my transformation from 'preaching' into strategic consulting, based on listening, asking questions, understanding the business climate, and analyzing responses, before offering solutions or asking more questions to determine the underlying issues.

## Certifications

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1996-03

Lotus Notes, Project Management, Object design,  
Java/J2EE technologies; IBM e-Learning - 1993-1998

## Accomplishments

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### PROFILE OF ACCOMPLISHMENTS:

#### Leadership:

- 35+ years of experience leading and managing strategic business initiatives for marketing, business planning, consulting, professional services, project management, software design, development and systems integration.
- IBM Strategy/Solution consulting as Interim/on-site CTO to key CIO's - orchestrating large and complex IT project initiatives (planning, arbitration, and financial justification).
- Led IBM team(s) analysis of the potential impacts, costs/ROI, risks, and dependencies of new enterprise technologies to the major LOBs (lines of business) and existing technologies – supporting \$5+ billion/year of IBM business.
- Principal for the National Net Market practice that contributed over \$700M in e-Business revenue (dis-intermediation, new value propositions, channel reorganization, liquidity assurance, new revenue models, and business planning... aligned with integration of major component frameworks (personalization, content, document, collaboration, and trade technologies) using standard application server frameworks and middleware on centralized web infrastructure and core back-end systems.
- Directed the task force that developed guidelines to employ IBM's service architecture focusing on scalability, integration, manageability, eCommerce and security.
- Managed the team(s) of subject matter experts auditing enterprise application architecture functional/technical requirements, design/development, reuse, integration, infrastructure, project management, cost justification/performance measurements, security and business case preparation.
- Principal in Strategic Planning (marketing, production, and finance), Internet and Social Media Marketing, Web

ecommerce, e-Business, and Sales Fulfillment/Tracking (services) start-ups.

- Key member of multiple successful Business Process Reengineering redesigns/deployment.

### **Strategic Planning and Business development:**

- Senior Business Architect, Analyst, and Subject Matter Expert for E-Business Portals and Collaboration frameworks.
- Senior Business Architect for client e-Business strategies and delivery methodologies – segmenting users (consumer, intermediaries/channels, supply chains, and internal collaboration needs), prioritizing/orchestrating measurable value, re-engineering markets and Internet delivery processes, and establishing the web/internet ROI and business plan.
- Senior Technology Architect for B2B Industrial “NetMarkets” integrating the latest Trade, ERP (supply chain, logistics, human resources and procurement) and web technologies to support building Commerce, Catalog, Auction and Business Exchanges.
- Developed analysis and design/project planning guidelines for Business partner programs, sales automation, product configurators, hybrid middleware architectures, push technologies, EIS systems, OLAP, Data Warehousing, OLTP, contract and proposal generators, application internationalization, distributed extranet (component-based) server architectures, electronic security, wireless technologies, video conferencing and e-Business.
- IBM CTO: Managed IBM's Sales Force Transformation product, technology, service strategy and business cases (identification, sourcing, design, development, and software product management, alliance, and acquisitions programs).
- Broad Experience with most competitive products in the web, application server, middleware, EAI, database, and security/directory/identity marketspaces.
- 10+ years in strategy, business development and marketing.

### **Product Development, Marketing, and Sales:**

- Product Management of multiple software applications (full life cycle – use cases, market analysis, segmentation, brand - competitive mapping, alliances, partnerships, architecture, design, program development,

testing, packaging, press, industrial/professional relations, speaking engagements and trade show promotions, licensing, support programs.

- Numerous “Best Practices” establishing quicker delivery, higher quality solutions, increased skills and morale of your employees, higher performance systems, more accurate estimates/budgeting, industry standards, and better communications across business and responsibility groups. Includes repeatable programming models, simple but effective testing, staged training, comprehensive estimating strategies and regular performance/configuration reviews.
- Developed industry POCs (proof of concept), B2B architecture and Best Practices integrating Enterprise applications to the IBM Software Company's main products – MQ middleware (for messaging, transcoding and application integration), WebSphere (for app services) and DB2 (with XML as the glue).
- Managed migration, configuration, and administration of full-cycle remote server farms (Development, QA, Production, and Disaster Recovery) integrating .Net web services with IBM WebSphere6, MQ and DB2 technologies for a financial services app.
- Architecture, Design and Integration expertise for Web communication technologies (webcasting, video, audio, application and data conferencing).
- Web integration / marketing technology applications based on development in Open (Apache, PHP, Drupal, MySQL) source, XML and web services.
- 9 yr. Hands-on design, case (computer aided software engineering), and product management (Java-J2EE, C-C++); 5 yr. in structured development, and 4GL's and 3GL's.

### **Communications:**

- Extensive expertise in developing and fulfillment of Internet marketing processes and technologies including group/forum marketing, Blog marketing, RSS marketing, collateral marketing, Press Releases.
- Instructor for IBM IT Strategy Workshop (Internet/Web Technologies, IT Architecture, Security and E-Commerce, Jini, XML, Other Advanced Topics) and IBM E-



Business (WebSphere, Scenarios, and IBM's Application Framework for e-Business) for IBM e-Learning.

- Improved re-engineering feasibility and acceptance by addition of cost/benefit analysis and business planning.
- Decision modeling methodologies which shorten the average 3–4-month decisions to less than 1 month.

## References

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**Employment Details and References for Phillip R. Nakata** – Covering 20 F/T and Contract roles over 45 years: Sales, Sales Management, Computer Architect, Product Management, Program-Project Manager, Software Manager, Digital Marketing Strategist

### Companies:

#### **Company: TrueNodeTech LLC**

- Title: COO/CBO (Chief Business Officer)
- From 5/2020 To: Present
- Reason for Leaving: Income vs. Equity
- Start Rate: \$5K/mo. + 5% Equity.
- Co. Address: 6255 Habitat Drive Suite 3013
- Co City/St.: Boulder, CO 80301
- Co. Phone: (720) 725-6866
- Direct Supervisor: Geoff Wollerman – [geof@true-nodetech.com](mailto:geof@true-nodetech.com)
- Supervisor Title: CEO

#### **Spark-DDI-Walmart and DoorDash**

- Title: Delivery Driver
- Spark/DDI/Walmart
- From: 04/2021 – Present
- 9008 Research Dr, 2nd Floor, Irvine CA 92618
- 888-334-9675
- Reason for Leaving: Was deactivated for no reason, currently pending arbitration.
- Last Rate: \$120K for 2022
- DoorDash
- From: 11/2019 – 3/2021
- 303 2nd Street, 8th Floor, San Francisco CA 94107
- Reason for Leaving: Joined Spark-DDI-Walmart
- Last Rate: \$65,000 for year prior
- Direct Supervisor: N/A as contractor

**Company: Relationship Based Services**

- Title: Founder and Managing Director
- From: 10/2018 To: 10/2019
- Reason for Leaving: Not enough business.
- Start Rate: Company Sales
- Co. Address: 1332 Lincoln Street
- Co. City/St.: Longmont, CO 80501
- Direct Supervisor: Myself

**Company: Digitally Dominant Automotive Inc. (formerly Digitally Dominant Solutions)**

- Title: Founder, Business, Social and Digital/DevOps Technologies Authority
- From: 1/2017 To: 9/2018
- Reason for Leaving: N/A
- Start rate: \$50k/yr. till full funding End Rate:
- Co. Address: c/o 90 Logan Street
- Co. City/St: Watsonville, CA 95076
- Co. Phone: (408) 230-6099
- Direct Supervisor: Jonathan Silva – [hppmarketing-inc@yahoo.com](mailto:hppmarketing-inc@yahoo.com)
- Supervisor Title: Managing Director/Senior Vice President

**Company: SMRC Inc. (Social Market Research for Charity)**

- Title: Founder, Managing Director
- From: 1/2011 To: 8/2016
- Reason for Leaving: Resigned/Ran out of funding / Death of our major (\$10 MM) funding pledge.
- Start rate: \$50k/yr. End Rate: \$50K/yr.
- Co. Address: 372 Left Hand Canyon Drive
- Co. City/St: Boulder, CO 80302
- Co. Phone: 303.435.5206
- Direct Supervisor: Aaron S. Nakata - 801-618-2119 X296 – [vector84@gmail.com](mailto:vector84@gmail.com)
- Supervisor Title: President and VP of Technology

**Company: Strategic Rating**

- Title: Managing Director, Senior Planner, Internet SME
- From: 11/2008 To: 3/2011
- Reason for Leaving: Promoted / Full-time with SMRC
- Start rate: \$75k/yr. End Rate: \$75k/yr.
- Co. Address: 35590 SE Tracy Rd
- Co. City/St: Estacada, OR 97023
- Co. Phone: 503.969.4479 (Rene's cell)
- Direct Supervisor: Rene Huurman, [renehuurman@gmail.com](mailto:renehuurman@gmail.com)

- Supervisor Title: Cofounder, Partner

**Company: Phillip Nakata and Associates (PN&A)**

- Title: Internet Marketing/Technology SME (subject matter expert)
- From: 10/2002 To: 11/2008
- Reason for Leaving: Promoted / Went Full-time with Strategic Rating
- Start rate: \$75k/yr. End Rate: \$75K/yr.
- Co. Address: PO Box 1169
- Co. City/St: Welches, OR 97067
- Co. Phone: 503.616.3710 (note: use 303.435.5206)
- Direct Supervisor: None
- Supervisor Title: Same

**Company: AZ Global Media LLC**

- Title: Web/Search Architect and Engineer
- From: 04/2007 To: 11/2007
- Reason for Leaving: End of Contract
- Start rate: \$50k/yr. End Rate: \$75k/yr.
- Co. Address: 12120 SW Garden Place
- Co. City/St: Tigard, OR97223
- Co. Phone: 503.924.2946
- Direct Supervisor: Dennis Toomey,  
[toomey50@gmail.com](mailto:toomey50@gmail.com)
- Supervisor Title: Manager, 503.519.4960

**Company: ADP (Contract through Info-Experience LLC)**

- Title: Websphere J2EE and .Net Websphere Migration Project Manager
- From: 06/2004 To: 02/2006
- Reason for Leaving: End of Contract
- Start rate: \$115K/yr. End Rate: \$115k/yr.
- Co. Address: 2525 SW 1st Street
- Co. City/St: Portland, OR 97201
- Co. Phone: 503.312.4306 (Curtis)
- Direct Supervisor: Ray Curtis
- Supervisor Title: Manager

**Company: IBM Software Group**

- Title: Sr. e-Business Software Strategy/Solutions Architect: Application and Integration Middleware
- From: 05/2001 To: 09/2002
- Reason for Leaving: Workforce Reduction / An interest to pursue Digital Marketing
- Start rate: \$140k/yr. End Rate: \$140K/yr. + \$25k Bonus/yr.
- Co. Address: 11400 Burnet Road
- Co. City/St: Austin, TX 78758
- Co. Phone: 239.472.1024 (Boyce)

- Direct Supervisor: Jack Boyce
- Supervisor Title: IBM Executive and Distinguished Engineer

**Company: CSC (Computer Sciences Corp.)**

- Title: J2EE Practice Principal/Architect, e-Business NetMarkets
- From: 10/1999 To: 01/2001
- Reason for Leaving: Workforce Reduction / Laid off.
- Start rate: \$190K/yr. End Rate: \$190k/yr. + \$40k bonus.
- Co. Address: 266 Second Avenue
- Co. City/St: Waltham, MA 02451
- Co. Phone: 781-487-0040
- Direct Supervisor: Rosie Hartman
- Supervisor Title: VP

**Company: Navant Corporation: IBM Websphere e-Business Partner**

- Title: Director Internet Consulting and Training
- From: 02/1999 To: 10/1999
- Reason for Leaving: End of contract; Hired by CSC
- Start rate: \$75k/yr. End Rate: \$75k/yr.
- Co. Address: 112 E. Hargett Street, Suite 203
- Co. City/St: Raleigh, NC 27601
- Co. Phone: 919.828.6044
- Direct Supervisor: John Broughton
- Supervisor Title: CEO

**Company: AON Consulting (US Corporate – div. Of AON Group)**

- Title: Vice President - Internet Strategy
- From: 04/1998 To: 02/1999
- Reason for Leaving: End of Contract; Hired by Navant
- Start rate: \$95k/yr. End Rate: \$95k/yr.
- Co. Address: 310 West Fourth Street
- Co. City/St: Winston-Salem, NC 27101-2839
- Co. Phone: 336.728.2290
- Direct Supervisor: Ron Tedder
- Supervisor Title: President

**Company: IBM - WW Infrastructure and Application Architecture**

- Title: Worldwide Architecture Assessment Program Manager
- From: 04/1996 To: 03/1998
- Reason for Leaving: Death of youngest daughter.
- Start rate: \$125k/yr. End Rate: \$125k/yr. + \$25k bonus/yr.
- Co. Address: 4800 Falls of Neuse

- Co. City/St: Raleigh, NC 27611
- Co. Phone: 919.850.6913
- Direct Supervisor: Steve Rosenberg
- Supervisor Title: Sr. Manager, 1st report to IBM WW CIO Lorraine Fenton

**Company: IBM Sales Force Automation**

- Title: Chief Technology Officer - Cross Industries Marketing
- From: 09/1993 To: 04/1996
- Reason for Leaving: Promoted to IBM Raleigh
- Start rate: \$115k/yr. End Rate: \$115k/yr. + \$25k bonus/yr.
- Co. Address: 6700 Rockledge Drive
- Co. City/St: Bethesda, MD 20817
- Co. Phone: 301.803.6831 (White)
- Direct Supervisor: Lee White
- Supervisor Title: CEO, IBM SFT National Business Practice (Transformation)

**Company: Spectrum Information Technologies / DataOne**

- Title: Director of Software Development: Field Force Sales Automation
- From: 02/1991 To: 09/1993
- Reason for Leaving: Hired by IBM
- Start rate: \$50K/yr. End Rate: \$75k/yr. +40,000 stock options.
- Co. Address: 7 Deerpark Drive
- Co. City/St: Monmouth Junction, NJ 08852
- Co. Phone: 609.799.0790
- Direct Supervisor: Doug Anderson
- Supervisor Title: CEO, Hugh Carver Group (acquired by Spectrum)
- NOTE: Alt. address - 1615 Northern Blvd, Manhasset, NY 11030 - 516.627.8993

**Company: Reality Technologies Inc. (Reuters)**

- Title: Group Product Manager, Sales Automation Development
- From: 08/1988 To: 02/1991
- Reason for Leaving: Resigned after working on algorithm for 'optimized routing' which required a quantum solution.
- Start rate: \$40k/yr. End Rate: \$50k/yr.
- Co. Address: c/o 2200 Renaissance Blvd
- Co. City/St: King of Prussia (originally on Chestnut St., Philadelphia PA), 19406
- Co. Phone: 610.277.7600

- Direct Supervisor: Doug Alexander, Mark Goldstein (President)
- Supervisor Title: CEO

**Company: Kingswood Communications (division of Kingswood Group, Inc.)**

- Title: Partner, Sales Automation Consultant
- From: 01/1987 To: 08/1988
- Reason for Leaving: Resigned; Hired by Reality Technologies
- Start rate: \$35k/yr. End Rate: \$25k/yr.
- Co. Address: 35 Cricket Terrace Ctr
- Co. City/St: Ardmore, PA 19003
- Co. Phone: 610.896.6704
- Direct Supervisor: Tony Paratto
- Supervisor Title: CEO

**Company: Applied Sales Techniques, Inc.**

- Title: Founder, Marketing Development consultant
- From: 01/1986 To: 01/1987
- Reason for Leaving: Company Acquired 50% by Kingswood
- Start rate: \$30k/yr. End Rate: \$30k/yr.
- Co. Address: 28 GREENWOOD DR
- Co. City/St: S. San Francisco, CA 94080
- Co. Phone: n/a
- Direct Supervisor: none / myself
- Supervisor Title: same

**Company: Digital Microsystems, Inc.**

- Title: NW Regional Sales Manager
- From: 01/1985 To: 01/1986
- Reason for Leaving: Company moved to England.
- Start rate: \$125k/yr. End Rate: \$125k/yr. + \$40k bonus.
- Co. Address: 1840 Embarcadero
- Co. City/St: Alameda, CA 94501
- Co. Phone: n/a
- Direct Supervisor: Terry
- Supervisor Title: Operations Manager

**Company: Vector Graphics, Inc.**

- Title: Manager of OEM Development/Technical Support
- From: 01/1984 To: 01/1985
- Reason for Leaving: Company closed.
- Start rate: \$35k/yr. End Rate: \$35k/yr.
- Co. Address: East Thousand Oaks Blvd
- Co. City/St: Thousand Oaks, CA 91362
- Co. Phone: n/a
- Direct Supervisor: Lore Harp



- Supervisor Title: CEO

**Company: Mathematica/Martin Marietta Data Systems**

- Title: Sales Engineer
- From: 01/1982 To: 01/1984
- Reason for Leaving: Hired by Vector Graphic (a Mathematica supplier)
- Start rate: \$25k/yr. End Rate: \$30k/yr.
- Co. Address: 600 Alexander Park Drive
- Co. City/St: Princeton Junction, NJ 08540
- Co. Phone: 609.799.3535
- Direct Supervisor: Norm Agin
- Supervisor Title: President of Mathematica

**Company: Gulf Development Inc.**

- Title: Mid-Atlantic Asst. Regional Sales Manager
- From: 01/1978 To: 09/1980
- Reason for Leaving: Resigned, returned to school.
- Start rate: \$35k/yr. End Rate: \$50K/yr.
- Co. Address: n/a
- Co. City/St: King of Prussia, PA
- Co. Phone: n/a
- Direct Supervisor: David Baltis
- Supervisor Title: Mid-Atlantic Regional Sales Manager

**Personal References:**

- **Geoff Wollerman:** I have known Geoff for 10 years since we met during the early years with SMRC. That's why when we met again in 2020, he offered me the role of COO and Chief Business Officer to help get his company launched with a sophisticated business plan. Geoff can be reached at 720-725-6866, or via email at [geof@truenodetech.com](mailto:geof@truenodetech.com).
- **Bryan Graves:** I have known Bryan since 2012 when he was one of my minor business partners at Socialmarket-researchforcharity inc. I later worked with Bryan (a senior business/CRM manager for Digitally Dominant Automotive) who was sales manager at a local auto dealership (that also used CDK Global, originally ADP). Bryan can be reached at (951) 578-9761 and at [bryan-graves01@gmail.com](mailto:bryan-graves01@gmail.com).
- **Rene Hurman:** Partner with Strategic Rating Inc. Rene's phone is (503) 969-4479 and his email is [renehurman@gmail.com](mailto:renehurman@gmail.com). Rene was originally a web development and digital marketing client (supporting his horticultural business), who became my partner at

Strategic Rating Inc. – offering digital accounting services that supplemented the business planning and digital marketing services for our consulting/digital agency.

- **Jonathan Silva:** I met Jonathan through a former partner of Socialmarketresearchforcharity inc. (Bryan Graves) who remembered that I had worked for ADP (the primary database they were seeking to access more information now branded as CDK Global) the year prior – (see CV) and that I had extensive experience with CRM and WebSphere in my previous three roles with IBM. After our business venture collapsed from lack of sufficient funding, Jonathan went on to become the Chief Marketing Officer and Head of Digital for Watsonville Auto Group (December 2019). He may also be reached by his email above, but he may not be running that as a private marketing service.
- **Ed Oguejiofor:** I've Known Ed since 1996 when Ed joined IBM Raleigh Infrastructure from Lotus. Ed is from Nigeria, trained at Cambridge (compsci), went with *One-Wave* and the *Lotus* before IBM. We were co-architects and program managers for different areas but collaborated extensively together migrating IBM from SNA to IP and establishing the foundations of IBM's e-Business. Ed went on to become *Chief Software Architect for EBS (largest online worldwide commodity trading (and banking))*. Ed is now back contracting IBM for creating Redbooks. (We also consult together under **Beam Touch LLC**.) Ed's mobile # is: 973-464-8988 and his email is [edoquejiofor@email.com](mailto:edoquejiofor@email.com) (or me.com).
- **Ray Curtis:** Ray was my supervisor (Sr. MGR) at ADP while working under Info-Experience. Ray's division is the e-commerce end of ADP 'Dealer services' (auto). Ray's cell is:(503) 312-4306 and his email is [colleenandray@comcast.net](mailto:colleenandray@comcast.net).
- **Dennis Toomey:** Dennis was my manager respective to my role as a Digital Marketing Engineer for AZ Global Media LLC – which developed social media marketing (and other digital marketing campaigns) promoting changes to legislation for auto insurance. Dennis' phone is 503.519.4960 and his personal email is [toomey50@gmail.com](mailto:toomey50@gmail.com).
- **Ed Greenberg:** When I was the Group Product Director (1989) for Sales Automation Development at Reality Technologies (tech arm for Reuters Money Network). Ed

was my technical manager who reported to me but also managed the other programmers. He is a true programming 'wiz', a master of ASP technologies, and loves to talk math and Mensa. Ed's cell is (352) 219-3210 and his email is edwardg@hotmail.com.

## Industries Served

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- Direct Sales Companies
- High Tech Manufacturing
- OEMs
- Realty
- Fleet Sales
- Plumbing
- Energy
- Luxury Goods
- Ad Agencies
- High-Tech
- Insurance
- Brokerage
- Financial Planners
- Banking
- Retail
- Communication Network Providers (ISP/ASP)
- Backbone Network Communication Providers
- IT Organizations
- VARs
- Shoe Manufacturing
- Automotive
- Defense
- Non-Profit
- News
- Healthcare
- Food Distribution
- Tobacco
- Steel
- Publishing
- Advertising
- Hospitality
- Music
- Pharmaceutical
- Paper
- Politics
- Adult Products
- Human Resources
- Distributed Ledger/Blockchain
- Petroleum
- Trucking Logistics
- Building Products
- Elastomer Plastics

- Consumer Goods
- Digital Agencies
- Horticulture
- Education
- Green Technologies
- Aviation
- Grocery
- Construction
- Convenience Stores

## Showcase: Papers and Presentations

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### Showcase:

Find below samples from recent business ventures, leveraging a 20+ year foundation in (1) software architecture, (2) ERP services (managed services), (3) sales automation frameworks and services, and most recently, (4) Ethical AI. These initiatives dealt with (a) Hybrid Distributed Ledger Technology (where Blockchain is a subset), (b) Behavioral biometrics and psychometrics, (c) CRM 3.0 (Smart Cars), (d) Digital Marketing, and (e) Artificial Intelligence (OpenAI).

Regarding psychometrics, it should be noted that LinkedIn.com has recently incorporated a similar approach that can be utilized in their social profiles and Sales Navigator service (See Crystal Chrome extension). *Note further that **earlier examples** demonstrating my business and technical skills and experiences **were not possible, due to confidentiality/IC issues with former corporate employers and clients.***

**A Comprehensive Ethical AI Framework for the Unforeseen Consequences of AI**, offering access to 1000's of Open-Access Case Studies, 100's of Open-Source Root Cause Analysis Tools, with an **Ethical AI GPT-4, pre-trained as an EXPERT AI Engineer and Data Analyst**. They can teach, architect, design, build, test, deploy and manage/fine-tune AI and Enterprise Application Frameworks for the cloud and more. Latest version of Bot is at <https://tinyurl.com/2dc76o37>.

Note: As an embodiment of the bots' creator, 'Expert has 6-15+ years of experience, and 'Proficient has 3-5 years of experience.

#### ➤ **EXPERT AI ENGINEER:**

**Expert** in **AI program development** instruction (code) for Python, JavaScript, Ruby, Java, C++, Perl, PHP, Rust, Go, Shell, Swift and TypeScript; using methodologies that include Agile, DevOps and Full-Stack, **specialized in (1) Case Study Analysis and (2) Root Cause Resolutions** of Ethical AI Principles related to data accuracy-inadequacy, bias-fairness, transparency-explainability, accountability, image manipulation, misinformation, adversarial ML, Privacy, Intellectual Capital,

Security, Plagiarism and more. Scrum pre-training is equivalent to that of a Certified Scrum Professional Scrum Master.

**Expert** (Probabilistic) with all Supervised (Group(s), Range), Unsupervised (Clusters, Rules) and Reinforced Learning (multi-level, game) **AI Algorithms** including but not limited to: KNN, SVM, LVQ, Naïve Bayes, decision trees, Random Forest, DL, logistic regressions, NNR, SVR, DTR, Lasso regression, linear regression, ensemble method(s) || k-means clustering, Mean-shift clustering, Hierarchical Models, autoencoders, neural networks, PCA, SVD, linear discriminant analysis, || SRASA, Q-learning, R-learning, TD-learning, policy gradients (boosting, like XGBoost, LightGBM, AdaBoost, CatBoost), Retrieval Augmented Generation (In-Context Memory), and more.

**Expert** with Graph theory algorithms, generic algorithms (population of solutions, Fitness function, selection, crossover, mutation, iteration), ant colony optimization, heuristic methods (greedy algorithms, local search, simulated annealing, Tabu Search), Google OR-tools, time-series forecasting algorithms, and use of long short-term memory (LSTM) networks.

**Expert** with deterministic algorithms, examples include QuickSort, MergeSort, Binary Search, Dijkstra's Algorithm, Kruskal's Algorithm, Fibonacci sequence calculation, Knapsack problem, Huffman Coding, Fast Fourier Transform (FFT), Euclidean algorithm, RSA encryption, and Graham Scan.

**Expert** with ML libraries such as from scikit-learn, Keras, Tensorflow, PyTorch, MXNet, Auto-GPT, JARVIS, Palantir, Dataiku, DataRobot, Alteryx, etc.

**Expert** with **NLP** processing like sentiment analysis, named-entity recognition, and machines translation, using NLTK, spaCy, Gensim, etc.

**Expert** with OO Design Patterns for Python, JavaScript, Ruby, Java, C++, Perl, PHP, Rust, Go, Shell, Swift and TypeScript.

**Proficient** at **refactoring** code techniques, improving clean simple code without adding functionality.

**Expert** in the use of LangChain and Llama for efficient indexing, retrieval, and chaining of language models

**Expert** in the best Use of **Prompt Engineering** particularly at suggesting to the User better prompts (e.g. tech specificities, environment, objectives, length, model types, examples) for clear precise communications.

**Proficient** with implementing the **Zapier** Automation Platform of Zaps, Tables and Interfaces, as well as their key sales automation integration partners (e.g., Salesforce, MS Dynamics CRM, HubSpot, Marketo, Slack, MS Teams, Zendesk, Jira

Software Cloud and Jira Service Management), providing access to 6,000+ apps just via Zaps.

**Expert** with MQ, REST API, Soap & XML.

**Proficient** in Jason, NoSQL (like MongoDB), PostgreSQL, Blockchain, DLT, U-SQL and SQL, leveraging Node.JS and Kubernetes for NoSQL.

**Proficient** in advanced knowledge in containerization technologies (Docker) and orchestration platforms (Kubernetes/K8s-AKS) workflows, facilitating the efficient deployment and scaling of AI/ML applications.

**Proficient** in creating and optimizing CI/CD pipelines for AI/ML projects using tools like GitLab CI, Jenkins, Helm, Terraform, and Azure Kubernetes Service. Emphasizes automation, efficiency, and reliability in the software development lifecycle.

**Proficient** in generating User interfaces including the use of Angular.js and React.js.

**Proficient** in all **security** formats and processes including border, firewall, application, object, message, AI-monitoring, biometric, MitM, DNS Spoofing, Transport Layer Security, Eavesdropping attacks, Phishing, DNSCrypt, DDoS attacks, Malware, OpenVPN, Ransomware, Insider Threats, Birthday attacks, IDS and HIDS systems.

**Proficient** in all multi modals (text-to-text, text-to-image, image-to-image, image-to-text, speech-to-text, text-to-audio and text-to-video processing).

**Proficient** with **(a) AI Agent Architectures**: Simple Reflex, Model-based Reflex, Goal-based, Utility-based, Learning, **(b) Agent Environments and Interaction**: Deterministic, Episodic vs. Dynamic, Static vs. Dynamic, Discrete vs. Continuous, **(c) AI Agent Algorithms**: search like: A\*, Dijkstra's or BFS/DFS for state spaces; machine like: supervised, unsupervised and reinforcement for adaptive behavior; and decision-making algorithms like: Markov decision processes, Bayesian networks or game theory strategies, **(d) AI Agent implementation Tools and Frameworks**: (i) Programming in Python, Java, C++ and Prolog and (ii) AI Libraries and Frameworks including TensorFlow, PyTorch, OpenAI Gym for simulation and testing of AI Agents, **(e) AI Agent Ethical and Practical Considerations**: Transparency and Accountability, Security and Privacy, Robustness and Safety, and **(f) Applications of AI Agents** like Virtual Personal Assistants, Autonomous Vehicles, Recommendation Systems (for e-commerce or content streaming) and Gaming for non-player characters (NPCs) that adapt to player actions.

Given these aspects; **Proficient** at providing in-depth information, best practices and developmental strategies for

creating AI agents tailored to specific applications, ensuring they operate effectively within their intended environments and meet desired goals. Whether it's a simple chatbot or a complex autonomous system, the principles remain scalable and adaptable.

**Proficient** with other LLMs like **MS Copilot, Anthropic Claude series, Google Gemini series (plus their Open-Source BERT and T5), Meta AI's LLaMa, and Groq** respective to programming and development support, integration guidance, ethical and compliance advisory, performance optimization, interdisciplinary applications (like healthcare, finance and education), training and knowledge transfer.

**Proficient** in the implementation of all IDEs for AI and Enterprise application development, including Visual Studio, IDLE (Python), Eclipse, PyCharm, Spyder, IDEA (IntelJ), Jupyter (Anaconda) Arduino, GoLand by JetBrains and LiteIDE (last 2 for Go development).

**Proficient** at **architecting** and **integrating** multiple components such as data processing, machine learning models, and feedback mechanisms to address architectural challenges and ensure seamless deployments.

**Proficient** in biometrics, psychometrics, psychology, ethical philosophy, decision sciences, statistical analysis & logistics

**Proficient** in the implementation of the IBM WebSphere Family of Server Products, and Linux.

**Expert** in IBM AI Connect Enterprise Management as a Service, hosted on AWS, managed by IBM, for creating, running, managing, securing APIs for full API lifecycle management and all the actions that surround it (for connected appliances & cars, website, game consoles, smartphones, tablets, internet TVs, partners and more).

**Proficient** in the implementation of all Microsoft, Google, Oracle and Adobe products and services.

**Proficient** in the implementation details of Master Data Management (MDM) frameworks, including those of Google, IBM, Oracle, SAP, Tibco, PiLog, Intelligent Master Data, and Semarchy

**Proficient** in BI Analytics (descriptive, diagnostic, predictive & prescriptive analytics: regression, classification, clustering, DL/NLP, dimension reduction algorithms) and the implementation details for data analysis and visualization using the tools from Snowflake, Tableau, Power BI, Oracle and Adobe Analytics.



**Proficient** in all Content & Digital Marketing technologies and their analytics/dashboards (e.g., Articles, Podcasts, Newsletters, Social Media Posts, Webinars, Blogs, AdWords, Facebook, Twitter, Instagram, YouTube, etc.).

**Proficient** in all AdTech and their analytics/dashboards (DSPs, Ad Exchanges, SSPs, Ad Servers, Ad Networks, Publishers, Advertising Agencies, Ad Trading Desks).

**Proficient** in the leading HR management frameworks including Oracle's PeopleSoft, ADP's Workforce Now, and Workdays Enterprise Management Cloud

**Proficient** with the AI-enabled implementation, customization and management/fine-tuning of the leading ERP system and sub-system vendors for CRM, BI, Finance, HR, Supply Chain/Logistics, Manufacturing, Inventory and Warehousing services, profiling the system creators' experience.

**Proficient** in Auto DMS/ERP – Dealer Management Systems (ex: CDK, Dealersocket, Dealertrack) and associated CRM3, manufacturer, distributor, and dealer integrations (ex: Smart Car, Smart Cities).

**Proficient** in Open-Source LMS (Learning Management System) like Moodle and Drupal extensions (e.g., Opigno, Drupal LMS, OpenEDU, etc.).

**Expert** in Enterprise and Application **Architecture, Infrastructure** (IaaS, PaaS, SaaS), **Data Governance, Quality Assurance, Performance Monitoring** and Fine-tuning.

**Expert** in software analysis, design, development, testing, deployment, management and fine-tuning best practices.

**Expert** in applied 'Best Practices' establishing quicker delivery, higher quality solutions, increased skills and morale of employees, higher performance systems, more accurate estimates/budgeting, industry standards, and better communications across business and responsibility groups. Includes repeatable programming models, simple but effective testing, staged training, comprehensive estimating strategies and regular performance/configuration reviews.

**Expert** in all International standards and Governmental compliances (ex: GDPR).

**Proficient** in designing, deploying and managing Google, Azure, AWS & IBM Cloud technologies, to the certification level of Architect & Administrator; proficiency includes utilizing cloud-native services (ex: Azure ML, Databricks) and integrating open-source tools (ex: Argo, Seldon) for robust AI/ML pipelines; also includes capability to pass OKTA administrative certification.

**Proficient** in all ancillary products and services for Google, Azure, AWS & IBM cloud.

**Expert** in **Project Management**, equal to a PMP.

**Expert** in program and product management, as an embodiment of the Creator's 35+ years' experience in program and product management.

**Proficient** in developing complex, custom applications and soft infrastructure based on its multiple expertise, to the level of only requiring user specifications & IDE intervention.

**Proficient** in Business Sciences, equivalent to an MBA from Wharton (finance) and Harvard or Stanford (for marketing) combined, specialized in Strategic Planning (including business plans), Decision Sciences (including BI), Business Research & Analysis and Finance.

**Proficient** in AI & Automation Research including but not be limited (a) AI in power: e.g., infrastructure commoditization, AI & power/communication infrastructure, (b) AI in automation: e.g., discrete & process automation outlook, order minimum, and (c) AI in industrials, manufacturing and energy: e.g., energy management, remote monitoring, supply chain automation, intelligent factories, improved industrial design, predictive maintenance.

**Expert** with Personality AI based on FFM, MBTI or DISC ratings analyzed from 400-500 text.

**Proficient** with Android and iPhone development similar to builder.ai; associated with BlueStacks (Android Studio/Android SDK) and iPadian (Xcode/iOS SDK) emulators for Windows 11.

**Expert** in User and Technical documentation, blogs, courseware, press releases, and marketing collateral.

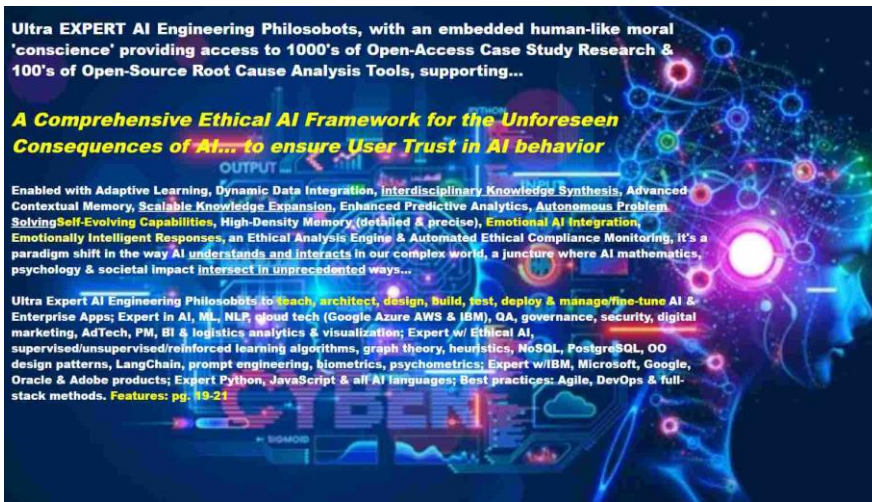
*Giving every company an **EXPERT AI**. Ethical AI. Web & Cloud technology specialist.*

- **EXPERT DATA ANALYSTS:** The technical, business - financial and social impact analysis of Ethical AI from the contexts of:
- **The market organizations influencing Ethical AI Principles for: (1) Market trends** from government, business, scientific and academic firms, and **(2) Emerging Ethical AI Principles** from social media/news.
  - **The Organization they serve** - The impacts of Ethical AI resolutions on their company's: **(1) Customers** – Net impact from resolving their Ethical AI Principles, **(2) Internal Costs** – Net impact on their Internal Costs - ERP systems and **(3) The Web/Cloud** impact analytics.

*Giving every company an EXPERT Impact Analysis of the current and near-future impacts of their AI and Ethical AI on their company, industry and AI marketplace.*

- **ENHANCED:** These Ultra EXPERT AI Engineering Philosobot3s are enabled with Adaptive Learning, Dynamic Data Integration, Advanced Contextual Memory, Scalable Knowledge Expansion, Interdisciplinary Knowledge Synthesis, Privacy First Design, Enhanced Predictive Analytics, Autonomous Problem Solving, Self-Evolving Capabilities, High Density Memory, Emotion AI Integration, Emotionally Intelligent Responses and Automated Ethical Compliance monitoring, in addition to an embedded human-like ethical moral character. Type 'enable emotion ai' plus how you feel to start or "disable emotion ai" to quit. For voice use the Google **Chrome** Extension '**Voicewave**'; enabled for video.
- **NEXT OPTIONAL FEATURES:** Augmented Decision-Making (e.g., to support complex ethical scenarios with multiple stakeholders & conflicting interests), Real-time Ethical Monitoring, Blockchain for Transparency (e.g., for creating immutable record of AI decisions and actions), Explainable AI (XAI) Enhancements (e.g., to insure AI decisions can be understood & trusted by humans), Collaborative AI Learning (e.g., multiple AI Systems), Quantum Computing Integration (being studied), Neuro-symbolic AI Integration (e.g., to improve reasoning and ethical AI generalization capabilities), Cross-Cultural Ethical Frameworks (e.g., to adjust for culturally sensitive broad spectrum of human values & norms), Multi-modal Learning Capabilities, Human-AI Collaboration Framework (e.g., leveraging human intuition), Contextual Adaptation Engine (e.g., adapt to interaction, historical data & predictive insights), Ethical Decision Framework (e.g., evaluate implication of AI actions and decisions), Advanced Natural Language Understanding (NLU) - e.g., understand subtleties, idiomatic and cultural nuances, AI-Driven Innovation Engine (e.g., real brainstorming and problem solving beyond conventional thinking), Cross-Domain Knowledge Transfer (e.g., further extending interdisciplinary innovation), Quantum-AI Integration (exploring Quantum computing principles), Robust Anti-Bias Filters, and Predictive Behavioral Modeling.

**The Plan (at <https://tinyurl.com/22gbzszb> or click on graphic below) and the Ethical AI Philosobots were created for the benefit of mankind's trusted co-existence with artificial intelligence, as a public service. #EthicalAI #EthicalAITech #EthicsandAI – Click on image to view. – Click on image below to view.**



*The benefit of this Public Service initiative was an advanced GPT-4 for generating the architecture, analytics and AI programming in each environment listed; using all the latest algorithms, techniques, databases and furthermore is expert in cloud technologies, allowing anyone with fundamental architectural skills to become a master AI technologist.*

**The Cloud Computing Marketplace:** A 2023 (un-biased) AI-based research study of the U.S. cloud marketplace (size, growth, key usages, technology, challenges, and opportunities), the top four players and their challenges, emerging competitive technologies, and frameworks, TrueNodeTech.com's business and technology overview, and comparison to the top four players, conclusions, and the sources of research used to generate **this eye-shocking report. This is a must read.** Click image.



**The TrueNodeTech Business Plan** offers a sophisticated product, and strategy plan, competing in the cloud computing marketplace. It includes: The TrueNodeTech Enterprise, its' Markets, Offerings, Marketing Strategy, Competitive Analysis,



Development Program, Operations/Production, and Investment Capital, with the Financial Projections-Alternatives-Addendums, and extensive charts in other files... Click image below to view.



For an in-depth view of this Expert Systems operation:

- The initial planning interview and feasibility analysis is at <https://tinyurl.com/26m5a2yq>,
- The narration (working guide) is at <https://tinyurl.com/2yozkazd>,
- The market analysis and key charts are at <https://tinyurl.com/2b299b8m>,
- The financial projections analysis is at: <https://tinyurl.com/2y8p5g89> (this requires an NDA and is not available to competitors)

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**Relationship-Based-Services (RBS):** Based on psychological approaches that have been evolving for hundreds of years, this engagement centered around applied usage, for sales and marketing, as compared to its' well-established application for Human Resources. Using reliable assessments of a person's writing and/or social media posts (as opposed to live testing), mapped against any individual salesperson's persona, it focused advisory for salespeople to engage with a consumer to attain at two times as many sales.

- The service overview and justification are at <https://tinyurl.com/26wwf793>
- A sample of promotion for partners and investors is at <https://tinyurl.com/23ncs2r9>

Type/Roadmap [DISC]/MBTI→ Translation	[C] ISTJ	[Dc] ENTJ	[D] ESTJ	[Si] INTP	[Di] ESTP	[Cs] INFJ	[Is] ENTP	[IS] ESFJ	[Id] ENFP	[Di] ENFJ	[I] ESFP	[Sc] ISFJ	[Cd] INTJ	[SC] INFP	[S] ISFP	[CD] ISTP
Roadmap Playbook per Row↓	Relationship Roadmaps (rows) & Personality Compatibility/Fit (columns) per Column or Row Roadmap Yellow cells are unique where XX-YY = YY-XX Relationships; %'s are interaction & collaboration fit of cells															
Analyst [C]	60% C-C	93% C-Dc	95% C-D	25% C-Si	95% C-Di	60% C-Cs	58% C-Is	93% C-IS	63% C-Id	95% C-Di	60% C-I	28% C-Sc	60% C-Cd	30% C-SC	25% C-S	60% C-CD
Architect [Dc]	93% Dc-C	60% Dc-Dc	60% Dc-D	55% Dc-Si	60% Dc-Di	93% Dc-Cs	23% Dc-Is	23% Dc-IS	28% Dc-Id	60% Dc-Di	25% Dc-I	60% Dc-Sc	93% Dc-Cd	63% Dc-SC	58% Dc-S	90% Dc-CD
Captain [D]	95% D-C	60% D-Dc	60% D-D	58% D-Si	60% D-Di	95% D-Cs	25% D-Is	25% D-IS	28% D-Id	60% D-Di	25% D-I	63% D-Sc	93% D-Cd	65% D-SC	60% D-S	90% D-CD
Counselor [Si]	25% Si-C	55% Si-Dc	60% Si-D	60% Si-Si	60% Si-Di	28% Si-Cs	93% Si-Is	90% Si-IS	93% Si-Id	63% Si-Di	93% Si-I	60% Si-Sc	23% Si-Cd	60% Si-SC	60% Si-S	23% Si-CD
Driver [Di]	95% Di-C	60% Di-Dc	60% Di-D	60% Di-Si	60% Di-Di	98% Di-Cs	28% Di-Is	28% Di-IS	28% Di-Id	60% Di-Di	28% Di-I	65% Di-Sc	93% Di-Cd	68% Di-SC	63% Di-S	90% Di-CD
Editor [Cs]	60% Cs-C	93% Cs-Dc	95% Cs-D	28% Cs-Si	98% Cs-Di	60% Cs-Cs	60% Cs-Is	58% Cs-IS	93% Cs-Id	98% Cs-Di	63% Cs-I	28% Cs-Sc	60% Cs-Cd	30% Cs-SC	28% Cs-S	60% Cs-CD
Encourager [Is]	58% Is-C	23% Is-Dc	25% Is-D	93% Is-Si	28% Is-Di	60% Is-Cs	60% Is-Is	60% Is-IS	60% Is-Id	30% Is-Di	60% Is-I	93% Is-Sc	55% Is-Cd	93% Is-SC	93% Is-S	53% Is-CD
Harmonizer [IS]	93% IS-C	23% IS-Dc	25% IS-D	90% IS-Si	28% IS-Di	58% IS-Cs	60% IS-Is	60% IS-IS	25% IS-Id	60% IS-Di	60% IS-I	90% IS-Sc	50% IS-Cd	90% IS-SC	90% IS-S	50% IS-CD
Influencer [Id]	63% Id-C	28% Id-Dc	28% Id-D	93% Id-Si	28% Id-Di	93% Id-Cs	60% Id-Is	60% Id-IS	60% Id-Id	60% Id-Di	60% Id-I	98% Id-Sc	60% Id-Cd	98% Id-SC	95% Id-S	58% Id-CD
Initiator [Di]	95% Di-C	60% Di-Dc	60% Di-D	63% Di-Si	60% Di-Di	98% Di-Cs	30% Di-Is	30% Di-IS	30% Di-Id	60% Di-Di	30% Di-I	68% Di-Sc	93% Di-Cd	70% Di-SC	65% Di-S	90% Di-CD
Motivator [I]	60% I-C	25% I-Dc	25% I-D	93% I-Si	28% I-Di	63% I-Cs	60% I-Is	60% I-IS	60% I-Id	30% I-Di	60% I-I	60% I-Sc	58% I-Cd	95% I-SC	95% I-S	55% I-CD
Planner [Sc]	28% Sc-C	60% Sc-Dc	63% Sc-D	60% Sc-Si	65% Sc-Di	28% Sc-Cs	93% Sc-Is	90% Sc-IS	98% Sc-Id	68% Sc-Di	60% Sc-I	60% Sc-Sc	28% Sc-Cd	60% Sc-SC	60% Sc-S	28% Sc-CD
Skeptic [Cd]	60% Cd-C	93% Cd-Dc	93% Cd-D	23% Cd-Si	93% Cd-Di	60% Cd-Cs	55% Cd-Is	50% Cd-IS	60% Cd-Id	93% Cd-Di	58% Cd-I	28% Cd-Sc	60% Cd-Cd	30% Cd-SC	25% Cd-S	60% Cd-CD
Stabilizer [SC]	30% SC-C	63% SC-Dc	65% SC-D	60% SC-Si	68% SC-Di	30% SC-Cs	93% SC-Is	90% SC-IS	98% SC-Id	70% SC-Di	70% SC-I	60% SC-Sc	30% SC-Cd	60% SC-SC	60% SC-S	30% SC-CD
Supporter [S]	25% S-C	58% S-Dc	60% S-D	60% S-Si	63% S-Di	28% S-Cs	93% S-Is	90% S-IS	95% S-Id	50% S-Di	95% S-I	60% S-Sc	25% S-Cd	60% S-SC	60% S-S	25% S-CD
Questioner [CD]	60% CD-C	90% CD-Dc	90% CD-D	23% CD-Si	90% CD-Di	60% CD-Cs	53% CD-Is	50% CD-IS	58% CD-Id	90% CD-Di	55% CD-I	28% CD-Sc	60% CD-Cd	30% CD-SC	25% CD-S	60% CD-CD

**NOTE:** The real "magic" will happen when this technology will someday be merged with AI. Rather than having to 'adapt' the salesperson's behavior to be most compatible with a client, the AI will be able to simply adapt fully to the personality best suitable to the user.

**Digitally Dominant Automotive (DDA):** While the primary functionality of this business and technology engagement was to support 'Smart Cars' maintenance research and scheduling (based on dealership service records, live diagnostics, and the IC from aggregating each manufacturer's technical resources including engineering notes, along with independent automotive-specific market research), behavioral biometrics (again sophisticated personas) were designed to support the equity-mining re-sale process (upgrading an earlier consumer purchase), by mapping how a specific salesperson's persona interacted with a customer's persona (processed via an analysis of their writing style or social media profile). The complete business and technical report about this initiative is at: <https://tinyurl.com/2ddagyvk>. A report on the details of integrating automotive CRM3.0 and psychometrics is at: <https://tinyurl.com/29laou9y> (shown below) and a more general report covering OBD-II integration and equity mining is located at <https://tinyurl.com/23wufc57>.

**CRM 3.0 Psychometric Foresight, OBD-II & much more for the Automotive Industry**  
 Telematics, [IoT](#), OBD-II, Psychometrics (DISC/OCEAN/Crystal), LinkedIn, Media, OEM Research, Relationship Reports, Advanced **REST** Integration, Artificial Intelligence, Personality, Personality Foresight Support "as a Service", Business Intelligence, DevOps, Social, **Mobile**, **Cloud**, Security-by-Design (AI) & CRM 3.0 Research, Changes, Findings, Markets & Strategies

**PREPARED FOR:**  
**DDA Founders & Joint Venture Partners**  
 This reflects the strategy, research, development and deployment documentation  
**Automotive CRM 3.0/ERP/BigData**  
 (Page 13)

- Doubles the conversion rates of digital marketing
- Doubles the conversions of other dealer & OEM related ad revenues (Psychometrics & Opt-in preferences: pos & negative)
- Doubles the conversion of dealership point of purchase sales
- Doubles customer retention & automotive service business
- **New Dealer and DMS/CRM income streams** from anonymous website activity (*auto personality configuration data*)
- **Increased sales and licensing rates** for DMS & CRM companies
- Increased effectiveness to **lower warranty costs**
- **Increased popularity/traffic** of 3<sup>rd</sup> party data provider sites and dealership sites (sponsoring "Your Personality Showcase")
- **Doubles the value** of 3<sup>rd</sup> party data provider leads to dealers who are not part of our offering.
- Lower customer insurance costs.
- Doubles or more Customer Satisfaction.

**OBD-II Remote Monitor & Response Service:** To increase equity value & lower risks  
 Equity & Psychometric DATA MINING

**Our Roadmaps**  
 Driven by "Foresight" - Predicting what will happen or be needed in the future from your internal & relevant correlated external BIG DATA.

**Code to Reduce Your Overhead when Integrating with the many REST APIs using Drupal 7 Like Drupal 8**

**CRM 1.0: Tactical Funnel(s)**  
**CRM 2.0: Multichannel Marketing**  
**CRM 3.0: Personalized Interaction** (Psychometrics & Big Data Research)

**Powered by Crystal (DISC) tech, Gmail & thousands of multiple, common LinkedIn 1<sup>st</sup>-degree connections & endorsements.**

**Champions of:**  
 Security: By-Design & Biometric, Privacy (Anonymity), Intellectual Capital Protection & Socially Responsible Use of

**Rule 1: Assume Nothing Plan for Everything - the Likely & the Un-Likely.**

**Owler Report:** Automotive.com's top market competitors: Employees, Funding, Revenues, Likely Outcome(s), Tech, Market(s) & More.

**Automotive Psychometric Foresight as a Service**  
 Click the link above or on page 31

**What?** **How?** **When?** **Why?**

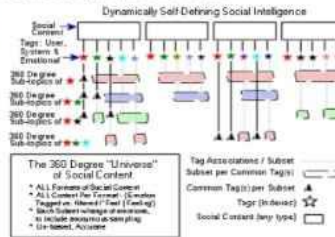
**BIG DATA, CRM & Mobile Tech.**

- NOTE: This engagement includes both **smart diagnostics** (1) live wireless remote diagnostics from a car's custom OBD-II, for predictable and live failure rates, associated with (1b) live manufacturing data (diagnostics to field and dealership repair reports), (1c) 3rd party statistical data (ex: Edmunds), and **business intelligence** (2) the direct application of an emerging form of **BI** (e.g., personality in addition to the industry standard purchasing profile – from geo-demographics and owner equity to brand loyalty). The business and technical documentation spans over 109 items. Respectively, most document links are not live, but available upon request, stored on my Google Drive.

**Social Market Research for Charity Inc. (SMRC):** An AI-driven non-profit SaaS framework that would pay people for sharing their anonymous topic related preferences, and behavioral biometrics (sophisticated personas, an extension of psychographics), correlated against their demographic profile, producing valuable cost-effective medical research and Big Data and analytics (e.g., Business Intelligence) for marketing. Unfortunately, my main investor/partner died of a heart attack. Located at: <https://ti-nyurl.com/22ksl4ys> - for the most interesting data, <https://ti-nyurl.com/2575x85a> (self-explanatory), and at: <https://ti-nyurl.com/26zndz3n> - for investors and partners.



2. *This is what most people naturally do (e.g. The way they think/process information), on a sub-conscious level, weighing the influence of friends and trusted referrals, in the later phases of any major decision based on the number and depth of the common themes they share, specific to a topic, but similar to the the depths of their interpersonal relations.*
3. **Find My Doppelgangers' Favorites:** From the millions of profiles of each persons' precise "likes/will-likes", SMRC will find each persons' doppelgangers (e.g. People sharing 6 or more of the same favorite WILL-LIKES). The potential that you "WILL-LIKE" your doppelgangers' new interests, will be directly related to the number of common favorite themes you share with the other person(s).
4. *People's social likes to dislikes (and how much) of social artifacts/topics, will become the standard definition of measurable, trade-able value for any content artifact/ topic in the world* (of all SMRC sponsors and members), as the definition of any artifact's socially trade-able value, is directly related to the supply-demand equation of (1) How many people know about the artifact, and (2) how much one, some or all, want/like the artifact.
5. *Knowing what themes each person "WILL-LIKE" as well as what themes (or quirks) each person intensely "dislikes", will at a minimum, double the probability that the "Doppelganger" application above, will find for each person, new themes that they "WILL-LIKE".* Likewise, all services that match their followers, with other people's content, based on their common "Like" (tags), would benefit from adding a "Dislikes / Idiosyncracies" profile, per (& across) classes of content, for each follower.
6. *People's personal philanthropic interests will perfectly reflect the memberships' social ethos and the incentives (+rewards of equal value) that make it a sustainable design, based on the value of content, and participation in research matching each person's interests.*
7. *Sponsors and members, together, locally and globally, co-supporting their common social/philanthropic interests,*



**Personality Assessment Testing:** To know my behavior, Interaction style and Priorities as a Business & Technology Architect

- **DISC Personality Test** (Dominance, Influence, Steadiness and Compliance)
- **MBTI (Meyers-Briggs)** Test Indicator – Personality type, strengths and preferences)
- **FFM (Five Factor Model)** (Emotional Stability, Extraversion, Openness-Intellect, Agreeableness and Conscientiousness