Services Roles in Technology

- ▶ **VP of Professional Services**
- ▶ **Customer Delivery Director**
- ▶ **Consulting Partner**
- ▶ **Field Architect**
- ▶ **Program Manager**
- ▶ **Presales Leader**

Key Offerings / How I can Help.

- ▶ **Services Organizational Review and Alignment to Organizational Priorities**
- ▶ **SaaS Services Best Practices**
- ▶ **Service Offerings Development**
- ▶ **Services Sales Process Review**
- ▶ **Delivery Methodology Creation**
- ▶ **Best Practice Strategy: Capture to Roll Out**
- ▶ **Project Monitoring and Control Processes**
- ▶ **Operational KPI Review**

Technology Domains

- ▶ **Internet of Things / Industry 4.0**
- ▶ **AI and Machine Learning**
- ▶ **Enterprise Integration**
- ▶ **Real-Time Streaming Data**
- ▶ **Cloud and Microservice Development**
- ▶ **SaaS Packaged Business Application**

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Field Services Leader with deep roots in technology

Matt is a proven executive leader, self-starter, and creative thinker with 30+ years of experience in the field of consulting, software, and cloud. My expertise is helping SaaS / Software companies build and scale a strong services organization to profitably and repeatably deliver implementations for large, transformational programs, solution implementations, or advisory on products. Matt has the end-to-end view, from sales to deployment, and follows the mantra "sell and deliver" to ensure customers achieve the highest level of success.

▶ As a partner for a management consulting firm, proposed and sold transformational program brought together the consulting offerings, partner offerings, and client capabilities.
Activities included: Proposal Development, Business Case and ROI Calculator, Pricing, Back-to-Back SOW, Deal Reviews and Organizational Alignment
  - o Industry 4.0 transformation program for a global semiconductor manufacturer
  - o End-to-end digital transformation for a specialty chemical provider
  - o Complex solution to monitor traffic on a busy construction site

▶ As director for a SaaS product company, partnered with sales to sell new solution implementations. Independently drove follow-on services to account for ~60% of revenue over the year. Activities included: Tailoring service offerings, Scoping Workshops, Coach team on Value Based Proposals, Contract Negotiations and Risk Review process, Forecasting
  - o Partnered with sales to sell ~25 new front-to-back trading transformations in the cloud
  - o Independently drove 50% services revenue target through follow-on services
  - o Doubled all key metrics: Revenue, Bookings, People, Projects, Go-Lives

▶ As practice manager and presales leader for a growing software company, provided presales and services engagement to ensure client success with a right-sized set of services.
Activities Included: Service Offering Creation, Services Enablement, Alignment with Product and Support
  - o Developed real-time integrations in support of Algorithmic Trading, with an eye toward productization in a future release
  - o Created a range of packaged service offerings for an Integration Platform to enable the client for success, such as "architecture review" or "deployment health check".

SELL AND DELIVER
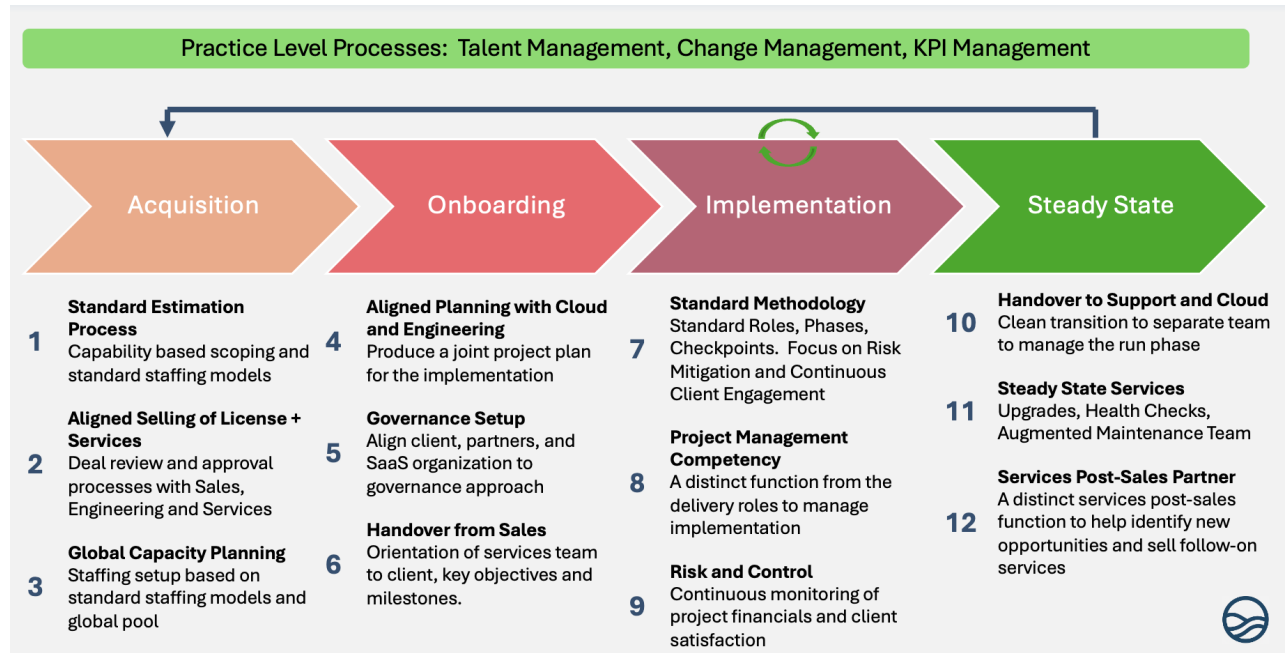
Key Metrics

- ► Bookings
- ► Revenue
- ► Margin
- ► Utilization (on-shore / off-shore)

Services Tools

- ► Salesforce for Opportunity Management
- ► Open Air for Services Management
- ► JIRA for Project Management
- ► Stack Overflow for Knowledge Capture

Key Philosophies

- ► Grow Leaders and Empower People
- ► Focus on Delivering Value
- ► Teach and Reinforce the Principals
- ► Ethical and Transparent Business Behavior is paramount
- ► Follow the process – but stay flexible to change
- ► Act like a Start-up
- ► Continuously Innovate

Practice Level Processes: Talent Management, Change Management, KPI Management

Acquisition	Onboarding	Implementation	Steady State

Acquisition

1. **Standard Estimation Process** Capability based scoping and standard staffing models
2. **Aligned Selling of License + Services** Deal review and approval processes with Sales, Engineering and Services
3. **Global Capacity Planning** Staffing setup based on standard staffing models and global pool

Onboarding

4. **Aligned Planning with Cloud and Engineering** Produce a joint project plan for the implementation
5. **Governance Setup** Align client, partners, and SaaS organization to governance approach
6. **Handover from Sales** Orientation of services team to client, key objectives and milestones.

Implementation

7. **Standard Methodology** Standard Roles, Phases, Checkpoints. Focus on Risk Mitigation and Continuous Client Engagement
8. **Project Management Competency** A distinct function from the delivery roles to manage implementation
9. **Risk and Control** Continuous monitoring of project financials and client satisfaction

Steady State

10. **Handover to Support and Cloud** Clean transition to separate team to manage the run phase
11. **Steady State Services** Upgrades, Health Checks, Augmented Maintenance Team
12. **Services Post-Sales Partner** A distinct services post-sales function to help identify new opportunities and sell follow-on services

SCALE AND REPEATABILITY

- ► As director for a SaaS company, transformed the organization to adopt a consistent set of processes across the customer lifecycle, creating better organizational alignment, efficiency for scale, and delivery excellence.
  - o Created a strong project management practice and governance practices to help manag delivery across cloud, product, and client deliverables.
  - o Created a new role and delivery model that recognized the need for providing deep Cap Markets experience to our clients and project teams (on-shore, off-shore, near-shore)
  - o Developed a highly empowered organization, allowing employees space to grow and su while continuously reinforced through common operating principles and processes

- ► Contact me for a best practices review and evaluation against the key processes above to determine how you can optimize service delivery.