

Robert Fitch

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BACKGROUND SUMMARY

Robert is an experienced and successful Project Management professional with expertise including agile-centric planning, discovery, requirements gathering, business and technical analysis, delivery and execution of enterprise-wide project plans. For more than 19 years, he has delivered project management, functional & technical skills to a variety of clients and industry verticals.

Employment

- Accenture
- TCS
- Publicis Sapient
- Birlasoft
- HAF Technology Solutions

Skillsets, Roles & Responsibilities

Project Management Responsibilities

- Project planning
- Discovery
- Project roadmap
- SoW
- Resource capacity planning, allocation & management
- Sprint management
- Relevant documents and other project deliverables
- Risk assessment & management
- Executive/stakeholder meetings
- Adherence to Agile methodologies
- CRM focus – Salesforce certified
 - SF Admin
 - SF Sales Cloud Consultant - pending
- Large team management
- Deep customer facing interactions at all levels:
 - C-Level
 - Technology delivery
 - Business strategy
 - Technical/functional interaction
- Leveraged experience with a broad range of software products, IT services, sales/new business development skills, business processes and consulting methodologies to achieve or exceed success metrics.

Verticals

- Government:
 - Department of Defense
 - Veterans Administration
 - Department of Transportation
 - State/Commonwealth: NJ, MA, NM, VA
- Automotive – Ford EV
- Financial/Banking - Synchrony Financial
- Transportation - NetJets
- Logistics - UPS, FEDEX
- Insurance - AON
- Manufacturing - GE Aviation, John Deere, Dupont, ESAB, Colfax
- Communications - Cox Communications
- Energy/Utilities - Sypris Technologies
- Not-for-profit 501(c)(3) – ASCAP

ATTRIBUTES SUMMARY

- A Salesforce certified professional with a background that includes management of more than 25 major projects.
- Demonstrated the ability to successfully sustain multiple, complex projects within tight time and budgetary constraints.
- A consistent subscriber to the necessity for developing and maintaining traditional long-term customer relationships.
- Strong communications and interpersonal skills; an effective negotiator, motivator; comfortable dealing with a wide range of high-level business professionals, co-workers, alliance and project partners.
- Experienced in the development and implementation of "Total Solutions" plans and programs to enhance customer relationships, increase productivity and improve profitability.
- Presented a proven record of project successes.
- Excellent organizational, time management and problem-solving abilities.
- Fully committed to an environment that includes collaboration, inclusion, diversity and overall community improvement.
- Managed projects that included as many as 75 team members.

PROFESSIONAL EXPERIENCE

April 2021 to Present – HAF Technology Solutions, PM Contractor

HAF is a consulting company specializing in customer relationship management and other implementation services. Based in Augusta, Georgia, HAF Technology Solutions was incorporated in 2013 to serve as a Salesforce conduit for US based companies in need of CRM technical and business strategic solutions. HAF also provides other consulting services encompassing a wide variety of technical disciplines and software products.

My role with HAF is to provide agile-focused, project management services involving complex CRM & AI environments. In this capacity I manage the delivery of all project planning, resource management, development, testing, training, deployment, and support tasks. I am also responsible for overseeing the integration of complementary software or legacy systems to complete an enterprise-wide customer vision.

Summary of HAF accounts (details below) include:

- UPS
- Department of Defense
- Publicis Sapient
- Synchrony Financial
- AON Insurance
- ASCAP
- ESAB
- Colfax
- Dymax
- Veterans Administration

November 2021 to July 2022 – Publicis Sapient, Senior PM & Director Product Management, Salesforce Practice

Before joining as a Project Manager, I partnered with Sapient as a contractor on the UPS account through my corporation, HAF Technology Solutions. During that time Sapient engaged with UPS to launch a global transformation program. I was then hired full-time as Lead PM to head the global Salesforce and IBM rules engine (ODM) initiative. This program involved the following project components and was managed in Azure DevOps.

SALESFORCE CORE PROGRAM

- Over a multi-year period migrate key legacy systems to Salesforce.
- Implement various Salesforce platform products to eventually become the system of truth for UPS.
- A thorough analysis determined that a Salesforce rules engine solution was not adequately robust, so it was decided that IBM ODM would be used.
- Complex integrations were required to bolt on key UPS applications, on an iterative basis, as the primary migration solution rolled out.
- This was to be a global solution impacting every aspect of UPS business.

DATA & ANALYTICS PROJECT

- CRM Analytics (formerly TCRM) for data analytics.
- Einstein and Analytics Studio for AI.

January 2020 to April 2021 – HAF Technology Solutions, PM Contractor for the Department of Defense/US Air Force

In this engagement with the DoD, I joined the team that involved a direct partnership with Salesforce. The projects included an internal government agency, AFWERX that seeks innovators from both within the US Airforce/Space Force as well as from external sources to provide operational solutions to challenges facing the service. The objective is to encourage a collaborative environment with private sector business, preferably technology startups, in conceptualizing and developing innovative products and services.

As Senior PM reporting to the agency Director, my responsibilities included:

- Manage multiple simultaneous projects for the following DoD, Salesforce initiatives:
 - Space Force
 - AFVentures
 - USAFE – European/African command including 8 MAJCOMS
- Served as PM for a project that analyzed the DoD environment to assess the application, integration and optimization of various technologies including Salesforce and a variety of disparate tools.
- Make recommendations with respect to the state of various Salesforce instances.

- Build a technology organization including the hiring of Salesforce skill sets.

The projects involved various products from the Salesforce platform:

- Service Cloud
- Experience Cloud (formerly Communities)
- Government Cloud
- Marketing Cloud
 - Email Studio
 - Social Studio
 - Journey Builder

During this time, I also served as Project Manager through HAF for the Commonwealth of Mass

October 2019 to January 2020 – HAF Technology Solutions, PM Contractor ASCAP

ASCAP, The American Society of Composers, Authors and Publishers is a not-for-profit 501(c)(3) organization that is supported by more than 700,000 members as well as fans throughout the United States. ASCAP licenses millions of songs publicly performed more than a trillion times a year and compensates its members with royalties. This organization is the largest of its type in the world.

Management and other Responsibilities:

- PM for the “A1” Salesforce/CPQ project (this involved standing up a net new Salesforce org)
 - Sales Cloud
 - Service Cloud
 - Experience Cloud
 - Salesforce Industries (formerly Vlocity)

August 2018 to October 2019 – Accenture, Level 6 Project Manager/SFDC Practice

With more than 500,000 employees in 120 countries, Accenture is one of the premier consulting companies on the planet. My Salesforce expertise is incorporated into Accenture’s Technology division.

Responsibilities:

- Project resource management
- New business development
- Project estimation and P&L analysis
- Corporate vision & scope
- Team management

PROJECTS: (Starting with the most recent)

FedEx – Technical Debt Program

Working onsite in both WHQ (World Headquarters) as well as (WTC) World Technology Center in Memphis, TN, I was asked to lead a variety of SFDC-centric projects falling under the Tech Debt banner:

- DevOps focused Sample Data Set
- Orphaned Account Hierarchies
- Mass Uploads
- SFDC Admin Audit

Challenges:

- Preserving account hierarchical structure.
- Creating a sample data set for Dev and Dev/Pro lower environments across 212 objects.
- Building a fully automated upload process.
- Curtailing the risk associated with a proliferation of System Administrators while preserving business functionality.

Solutions:

- Created queries in Ab Initio against relevant Teradata tables to identify and mitigate orphaned records, then used criteria to isolate and delete nearly 22M damaged records in SFDC environment.
- Built a dataset utilizing a subset of production data suitable for Dev sandbox environment, but containing all required business functionality, including complex account hierarchies. Sample data was then accessed as a template to replace limited refresh feature of a full sandbox.
- Deployed an automated upload process for a defined SFDC profile permitting non-technical users to upload sales “projects” using Jitterbit Data Loader.

Cox Enterprises – SFDC Multi-cloud Implementation

Cox is a private conglomerate (US \$20B, 2017 revenue) with offices in the Atlanta, GA area. My onsite role in this program was as a SFDC Project Manager & Enterprise Architect. Business units include:

- Communications
- Media Group
- Automotive

The focus for this engagement was within Cox Communications and included:

- Sales Cloud
- Service Cloud
- Einstein
- Heroku platform

July 2017 to August 2018 – HAF Technology Solutions

Engaged in a variety of projects and assignments as a contractor.

November 2015 to July 2017 – TATA Consultancy Services (TCS) - Senior Project Manager, Salesforce SME

TCS, a global consulting company recognized as one of the “Big 4 Global IT Services Brands”, is positioned as one of the premier providers of enterprise IT services, including Salesforce.

I joined TCS as a senior Project Manager, and to also serve in a pre-sales/sales engineering capacity. My responsibilities include:

- Project development and management
- Team management, including offshore contingent
- Testing and deployment
- Engaging multiple clients as necessary
- Answering or assisting with RFP's
- Pre-sales
- Sales engineering

PROJECTS: (Starting with the most recent)

GE Aviation

GE Aviation is a division of General Electric with headquarters in Ohio. The company provides aircraft engines for most commercial and military aircraft along with a variety of support and maintenance services.

Challenges:

- Need to simplify and optimize overall sales and service cloud environments.
- Access current CPQ environment (Apttus) for possible revision or sunset.
- Integrate ComEng and Systems SFDC instances with other operational, modeling, approval, data management and compliance applications and directives.
- Synchronize with GE Aviation's digital initiatives.

Solutions:

- Conduct a complete platform discovery along with impact analysis.
- Redesign what is now a complex and cumbersome sales process.
- Minimize complexity utilizing configuration vs customization where possible.
- Review and redesign data model.
- Review and assess code coverage.
- Move GE Aviation to the Lightning experience.
- Combine multiple SFDC orgs.

DuPont

DuPont is a 200+ year old chemical and energy conglomerate producing a wide range of products that are distributed globally. My role includes functioning as the Project Manager for the Lotus Notes global migration as well as both a Salesforce Solution and Technical architect.

Challenges:

- Migrate more than 250 Lotus Notes databases to Salesforce.
- Conduct multiple workshops for each database.
 - Functional analysis

- Relative complexity
- Technical analysis
- Assess merging, repurposing and/or archiving options.
- Improve process functionality, represented in the Lotus Notes applications, using these databases.
- Implement these processes on a global level.
- Major re-design of 10+ year old legacy applications.

Solutions:

- Demonstrate functional and technical feasibility with a Proof of Concept.
- Employ Escape Notes application to assist in LN application(s) analysis and migration to Salesforce.
- Minimize complexity utilizing configuration vs customization where possible.
- Employ the DuPont data model including leveraging corporate master data.
- Utilize a “OneShore” resource model.

John Deere

John Deere is an American corporation that manufactures agricultural, construction, forestry machinery, diesel engines, drivetrains used in heavy equipment, and lawn care equipment. The company has introduced a community portal, MarketPlace designed to serve as a primary revenue engine over the next 5-10 years. In addition, Deere will use the portal to provide a venue empowering its global dealer network to self-brand. My efforts here yielded a new logo for TCS.

Challenges:

- Migrate functionality from legacy systems to the MarketPlace environment.
- Utilize Apttus for product configuration, sales, service and service-level agreement generation.
- Integrate with SAP and other back-end systems.
- Ensure MarketPlace can be scaled on a global level.
- Limit customization and employ OOTB functionality where possible.
- Ensure compliance.

Solutions:

- Conduct an assessment of MarketPlace.
- Provide a blueprint strategy to assist in global roll-out.
- Create an environment that provides greater visibility to John Deere technical teams.
- Implement a release management process to optimize code development and change request tracking.

Walgreens

- My engagement was limited to pre-sales and estimating their 340B project.

NetJets

NetJets, a Berkshire Hathaway company, is a provider of private and business jet fractional ownership and transportation services. The company, founded in 1964, offers high-end travel options to a select global clientele.

Challenges:

- An early adopter of Salesforce, NetJets has a complex org dating back more than 10 years.
- An acquisition with another aviation company further complicated the platform.
- The NetJets Salesforce environment more than 50% custom coded.
- Code lacked best practices.
- No release management strategy.
- Many unused fields.
- No comprehensive integration with other enterprise systems.
- Disconnect between marketing and sales.
- In need of a robust data management process.
- Lacking opportunity management.

Solutions:

- Delivered a roadmap of suggested next steps.
- Performed a “Health Check” analysis all code.
- Systematically optimized code.
- Built a Proof of Concept around Lead object redesign.
- Delivered an org-wide presentation addressing:
 - Marketing process optimization

- Lead generation process
- Lead object navigation
- Overall platform UX
- Green-field design to reduce customization
- Introduce data management best practices:
 - Naming conventions
 - Effective templates
 - Duplication reduction strategies

Initially there was significant resistance to possible substantial changes to the org until a meeting that included a team from Salesforce validated the strategy. Now NetJets is on its way to a simplified and effective sales, service and marketing environment.

February 2015 to November 2015 – Senior Project Manager - Birlasoft

Following the largest IPO by a U.S. company since Facebook in 2012, Synchrony became the latest in a series of GE spinoffs within the consumer financial services space. Synchrony is the largest issuer of store-branded credit cards.

Synchrony Financial

My role with this engagement is Senior Salesforce Project Manager servicing the following business units:

- Retail Card
- CareCredit
- Payment Solutions
- Synchrony Bank

Working as a liaison between the business side of Synchrony's requirements and IT, I have been charged to assist in the design and implementation of ongoing system developments as well as helping orchestrate technical and functional innovations in future projects.

Project responsibilities:

Synchrony has been engaged in massive application migrations as they establish a new infrastructure from GE's core systems, inherited from the divestiture. Although it is one of Synchrony's cloud-based solutions, Salesforce is a key client-facing component for the company, and as such integrates with a considerable number of other enterprise applications. I managed the following elements of the project:

- Efficient SF architecture in tandem with Synchrony's "Wave" migrations
- Defining sponsors, teams, budget, model and structure of new SF functional and technical structure.
- Identifying governance, risk and compliance issues.
- Relevant processes, best practices, conventions and methodologies.
- Building a collaborative SF environment relative to Synchrony's business and technical communities.

The high-level deliverables include:

- The SFDC re-design project, entitled "Affinity".
- Although the effort is collaborative between the company's business and technical communities, I have been tasked with creating a Salesforce environment that will ultimately be owned by IT.
- Deliver both functional and technical design documentation.
- Deliver project line-item functionality for the following:
 - Process flows
 - Data management
 - Compliance

May 2014 to February 2015 – HAF PM Contractor - Colfax Fluid Handling

Colfax is the parent company for ESAB. Key sales and upper management sponsors, following a review of the successful implementation at ESAB, requested that I develop a similar strategy for their sales organization. I have managed both projects concurrently.

October 2013 to February 2015 – HAF PM Contractor - ESAB Welding & Cutting

Based out of Florence, South Carolina, ESAB produces consumables and equipment, on a global level, for virtually every welding/cutting process and application. More than 100 years of continuous research, development and manufacture have made ESAB a world leader in welding and cutting products. ESAB has a substantial network of subsidiaries and distributors worldwide.

For years ESAB has struggled with creating a unified solution to their sales and service processes. They were also having difficulty with customer retention issues. The requirements call for a comprehensive sales and service solution

to drive their welding division by utilizing a proven methodology the company had implemented at the corporate level. My primary role was to serve as Project Manager.

- ESAB and Colfax required an MVP and a standardized sales process across both companies.
- The divisions needed to share sales data to upsell and cross-sell, but they looked at data in two completely different ways and needed to unify the overall data model.
- Integration with SAP
- Global roll-out

VALUE-ADD & ROI – *Although ESAB has not fully monetized the results, they realized immediate and dramatic efficiencies as a direct result of my efforts. For instance, they normally took as long as a week to process a lead, involving substantial handling, copying, filing and emailing. The process has now been reduced to under an hour.*

August 2012 to October 2013 – HAF PM Contractor - Sypris Technologies

The Tube Turns division of Sypris is a Louisville, KY based company specializing in a variety of manufactured solutions for the oil and gas industry. I was brought into Sypris in a backfill capacity to assist the company in completing their Salesforce implementation. Developed an immediate understanding of both Sypris' unique environment/business model as well as a deep understanding of the industry they serve. I helped create a new sales methodology for field and inside sales, third party reps and Sypris' partner network.

Senior Salesforce Project Manager & Developer

- Implement the Enterprise Edition – Sales, Service and Chatter.
- Create and configure customizations that represent oil and gas industry conventions.
- Develop process and workflows for a net-new SFDC org.
- Reporting and dashboard requirements for management and sales level users.
- Outlook integration.
- Integration with back-office ERP system, Dataflow.
- Manage the development of bi-directional web services between Dataflow and SFDC.

October 2011 to August 2012 – HAF PM Contractor - Holiday Retirement

I was contracted by Lakemont Consulting to manage Holiday (a REIT providing retirement community rentals and associated services) through a comprehensive and highly customized Microsoft CRM initiative. The project, named "InTouch", is a massive technologic and business undertaking designed to address the company's complex and challenging business model. To date this CRM Online implementation is Microsoft's largest, involving 2000 users in over 300 locations, serving 30,000 residents throughout the United States and Canada.

Senior Project Manager

- CRM Online project with 2000 users in an extreme, distributed network.
- Manage all project design.
- Manage a team of internal and external team members.
- Responsible for all internal and external development.
- Building a core solution around the Microsoft stack:
 - MS CRM Online
 - SharePoint
 - Office 365
 - ADFS environment
- Coordinate and manage the activities of vendors conducting CRM and JDE integration.
- Develop a comprehensive project plan for a complex and highly configured customer relationship management initiative.
- Employ best practices in both Waterfall and Agile methodologies.
- Work in a highly challenging and structured environment including compliance issue with the client's ongoing Sarbanes-Oxley mandate.

June 2011 to October 2011 – HAF PM Contractor - Dymax Corporation

Contracted by Integra Technology Consulting, I was engaged to conduct a comprehensive evaluation of major CRM vendors to assist Dymax Corporation with their selection of an optimized solution. The project also required an in-depth analysis of the impact of the selected CRM solution on their current JDE environment and the crafting of an integration strategy with their back-office. In this capacity, I managed the entire project as the sole consulting/technical/functional resource.

Role and Responsibilities

- Gather and evaluate prioritized requirements.

- Create and define documentation illustrating current and future process flows.
- Employing a technology agnostic approach, I evaluated the top 5 CRM vendors.
- Working with the Dymax CRM Evaluation Team and another 14 individuals from the company's CI ("Customer Intimacy") corporate initiative mandate, I utilized "Evaluation Framework" documentation to short-list the top 3 vendors.
- Provide weekly project status "dashboard" for Dymax management.
- Conducted onsite and remote meetings/presentations/status reports with all Dymax team members and corporate management.
- Conduct comprehensive RFP and TCO (total cost of ownership) analysis.
- Negotiated final cost to client with winning vendor.

❖ **VALUE-ADD & ROI** – *Dymax realized a savings of more than \$100,000 on their CRM purchase as a direct result of my effort, and ultimately made a net profit on the total cost of my engagement in this project.*

November 2010 to June 2011 – HAF PM Contractor - AON Insurance

Contracted to work directly for the CIO, this project involves the development of a sophisticated travel insurance, web initiative targeted to OTA's, cruise lines, airlines and direct consumers on a global level.

Senior Program/Project Manager

- Requirements gathering/prioritization.
- Building a prioritized requirements matrix.
- Comprehensive analysis of all relevant business processes and workflows.
- Assemble and manage both internal and external project teams.
- Gather input on all existing applications for gap analysis with proposed solutions.