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SUMMARY

- PMI-Certified Project Management Professional (PMP) #35684
- Certified in Microsoft, Oracle, PeopleSoft, SAP and Siebel technologies
- 15 years of experience designing and implementing CRM, ERP and GIS solutions
- Former practice manager and regional service line leader at Oracle Corporation
- Former national practice director at Answerthink (a division of The Hackett Group)
- MS in Systems Management from the University of Southern California; currently pursuing a Masters at Harvard
- Industry experience in banking, chemicals, electronics, CPG, government, health care/pharma, retail and software
- Military service in the United States Army (Major) and Marine Corps (Graduate, Officer Candidate School)

PROFESSIONAL EXPERIENCE

Independent Consultant, Software XT; 2001-present. *Founded a consultancy providing CRM strategy, business process analysis and reengineering, business case development, product evaluation/selection and project management services. Established and developed business relationships with a portfolio of clients including Fortune 500 companies (Johnson & Johnson, Kraft and Walgreens), small/midsize businesses and government agencies. The company was cited by best-selling business author and consultant Tom Peters (in The Tom Peters Seminar) because of its innovative and timely approach to business organization, and was also profiled in the Internet Business Guide, PC Today magazine and The Times of London. Key projects completed during this time period include the following:*

Project Manager / Business Analyst, IBM (SPSS, an IBM Company), Chicago, IL; 7/2008-Present

Business Analyst for the Outbound Marketing E-mail Preferences Platform (OMEPP) project.

- Authored the full set of business requirements documentation.
- Authored the comprehensive system test plan as well as the full set of test scenarios and test cases.
- Developed the materials for training the Marketing and Sales organizations in the use of the system.
- Conducted internal functional and technical testing; facilitated discussion and resolution of testing issues.
- Facilitated the User Acceptance Test (UAT) for users in the United States and Japan.
- Applications Implemented: Aprimo Enterprise 8.0, ColdFusion, Salesforce.com.

Project Manager for the Global Technical Support Portfolio project.

- Led the business discovery, analysis and implementation phases of a strategic Customer Service re-engineering initiative working in collaboration with the SVP of Technology, the CIO, and the Director of IT Business Delivery Services.
- Examined the existing relationships, business processes, toolsets and integration points involved in the customer's lifecycle across the multiple available communication channels and touch-points (e.g., web, telephone, electronic messaging, blogs, etc.)
- Developed personas and use cases to allow segmentation and modeling of the customer base; tailored and optimized business processes to more effectively support each customer segment.
- Determined how to enhance the quality of the customer's product research, post-sales, and support experiences, while also introducing efficiencies and cost savings through better automation and integration of systems, processes, and communication channels.
- Designed and recommended a customer portal strategy that would enable self-service customer transactions for the majority of the customer base at greatly reduced costs while freeing up resources to provide increased personal attention for the company's most valuable customers.
- Developed project governance documents (e.g., charter, scope document, workplans, issue/risk logs), business scenarios, detailed business requirements documentation, current state and future state process flows, functional design documentation, etc.
- Facilitated business requirements and functional design workshops including participation from organizations and individuals around the globe to assess the impact to organizations ranging from sales to finance to technical support.
- Implemented several key solution components including the replacement of e-mail based technical support with comprehensive web-based services, design and implementation of metrics for performance analysis, etc. Completed and handed off functional designs for the remaining solution components for phased implementation.
- Applications Implemented: Salesforce.com, Oracle 11i Service Contracts.

CRM Strategy Consultant / Subject Matter Expert, Johnson & Johnson, Somerville, NJ; 5/2008-7/2008

Performed a CRM assessment and strategy engagement for an operating unit of world's most comprehensive and broadly based manufacturer of health care products.

- Developed interview and survey questions designed to gather current process/technology performance data and highlight opportunities for improvement.

- Designed a set of reengineered, future state business processes, and mapped the gaps between the current state and future state in terms of people (e.g., skills, training and behaviors), business processes, and technology.
- Identified a number of strategic alternatives (e.g., re-training, re-implementation, implementation of additional Siebel functionality, integration of existing platform with other systems, migration to a new CRM platform) that may be used alone or in combination to satisfy the gaps.
- Developed a decision model that was used to evaluate these alternatives on the basis of multiple decision criteria, and investment profiles containing acquisition, implementation and support costs, anticipated hard dollar and soft dollar benefits, and return on investment (ROI) analysis.
- Developed a comprehensive CRM strategy document including a list of prioritized recommendations, Gap Analysis of business needs with existing process and system capabilities, future state CRM strategy/architecture that addresses customer needs analysis, and best practices recommendations.
- Applications Implemented: Siebel ePharma 7.5.

Program/Project Management Consultant, Kraft Foods, Glenview, IL; 2006-4/2008

Part of the Program Management Office (PMO) and initiative release team for a global (\$1 billion cost, 55,000+ users) SAP CRM/ERP implementation for the world's second-largest food and beverage company.

- Served as liaison between the PMO and several project teams (Order to Cash, Technical Architecture, Technical Infrastructure, Development, Security and Internal Controls) during program prep (ramp-up) and global blueprint phases.
- Contributed to the development of program processes, metrics, tools and documentation standards. Developed and conducted training for project teams covering program standards and toolsets. These included HP Mercury ITG for issue, time, scope and risk management; HP Mercury Project Workbench for program-level work plan management; Microsoft Project for project-level work plan management; and SAP Solution Manager for analysis and design documentation, transactions, configuration and development object management.
- Provided managerial and technical expertise to project teams relative to the development and update of their project workplans; developed the standard workplan template used by all implementation teams within the program.
- Following global blueprint, was retained by the client to assist the Release 2 team (Order Management, Order Fulfillment, Revenue Management and CRM) with project management activities.
- Applications Implemented: SAP Enterprise Resource Planning (ERP) Core Components (ECC) 6.0, mySAP CRM, SAP CRM 2007, SAP Solution Manager, and HP Project and Portfolio Management (PPM) Portfolio Management (Mercury ITG).

Management Consultant, Tripp Lite, Inc., Chicago, IL; 2006

Performed a solution assessment for a leading manufacturer of power protection and connectivity products.

- Performed a one-week baseline assessment of an e-Commerce storefront development and internationalization project. Interviewed the project sponsors and stakeholders to determine project history, scope and expectations.
- Determined actual project work completed (deliverables and percent complete) by decomposing the project scope into a logical Work Breakdown Structure (WBS), identifying WBS deliverables, auditing deliverable completion status, and calculating the percent of work complete associated with each WBS element.
- Developed a project completion plan, resource estimate and timeline for the remainder of the project by applying resources and dependencies to the remaining tasks.
- The project assessment and completion plan were adopted by the client company.
- Applications Implemented: Adobe/Macromedia ColdFusion MX7, Microsoft SQL Server 2005.

Project Manager / Solution Architect, SPSS, Inc., Chicago, IL; 2006

Took over a troubled implementation of an expensive, complicated e-Commerce storefront platform (Oracle iStore) that had been ongoing for 18 months.

- Evaluated project management control and source documents, reviewed completed and in progress deliverables, and interviewed business and IT stakeholders. Within 1 week, determined that the root problem involved the lack of a comprehensive e-Commerce channel strategy. This resulted in having no established, consistent corporate policy in areas where key business decisions affecting system setup needed to be made.
- Facilitated the client's exploration of strategic alternatives for the project, with the decisions being made 1) to place the iStore project on hold pending the development of a comprehensive e-Commerce channel strategy, and 2) to evaluate short-term, tactical options for upgrading or replacing the existing e-Commerce storefront.
- Developed a multi-attribute decision model, researched and evaluated numerous alternatives based on attributes such as feasibility, time to implement, cost, risk, etc.
- Recommended that the client pursue the short-term objective of upgrading its e-Commerce platform to the latest version of the same software, while evaluating more strategic options for achieving longer-term e-Commerce objectives once they were determined.
- The recommendation was accepted by the client, resulting in an immediate \$400K savings (the estimated cost to complete for the original iStore implementation).
- Developed the independent estimate (accurate to within 2% of the vendor's proposal), authored the Statement of Work, and negotiated the contract terms with the vendor.
- Managed the implementation of the recommended solution until corporate financial results prompted the company to bring virtually all IT contract work in-house.
- Applications Implemented: AbleCommerce 5.5, Adobe/Macromedia ColdFusion MX, SQL Server 2000.

Strategist / Solution Architect, The Walgreen Company (Walgreens), Deerfield, IL; 2004-2006

Strategist and Solution Architect for a custom-developed Marketing / Business Intelligence application for a Fortune 50 retailer.

- Completed the analysis and design of and advised on the development and implementation of the Media Analysis and Planning System (MAPS).
- MAPS is a GIS-enabled CRM and marketing analytics system that will enable the company to proactively optimize its nearly \$400 million annual advertising spend across multiple channels (broadcast, direct mail, print) and markets (over 4,500 stores nationwide).
- Developed the overall corporate strategy for a new department into detailed process diagrams establishing the department's operating procedures including activities, inputs, outputs and interactions with other organizations.
- Assisted the client in developing key metrics for determining organizational effectiveness and success.
- Identified data sources within existing systems to support the metrics, designed table structures for analytical and operational data stores, and designed Extraction, Transformation and Load (ETL) processes to get data from the existing systems into the correct locations and formats required to calculate the set of metrics.
- Developed requirements for, designed, and built a prototype of the main technology solution supporting the new department, processes and metrics.
- Developed several other production applications / components of the technology solution.
- Advised internal and external development teams charged with building components of the core production system and supervised system testing.
- Also facilitated the documentation and re-engineering of the corporation's direct marketing strategy and processes, shifting focus away from existing customer acquisition objectives toward a more balanced set of objectives weighted toward customer lifecycle-focused acquisition and retention programs.
- Applications Implemented: ESRI ArcGIS 8.3, ArcSDE, Microsoft Access, SQL Server, Visual Basic; SAS9, SPSS 14.

Program Manager, South Florida Water Management District, West Palm Beach, FL; 2002-2004

Program Manager for the selection and implementation of an enterprise CRM and asset management application for a state government agency.

- Managed the vendor selection, analysis, design, development and implementation of the Integrated Real Estate Information System (IRIS). IRIS is a geographical, workflow-based CRM and asset management system (based on Oracle 8i RDBMS, Accela Automation and ESRI ArcGIS, with integrations to Documentum and Primavera P3e, a set of mobile forms applications running on HP iPAQ PDAs, and future applications integration to SAP R/3 4.6C) which enables this state agency to manage the acquisition and management of over \$3,000,000,000 (three billion dollars) in real estate.
- Defined the system requirements and developed the overall solution architecture.
- Estimated the expected initial system acquisition costs under various scenarios ranging from implementation of an off-the-shelf (COTS) solution to development of the system using custom development tools.
- Performed a "build versus buy" analysis, and determined that a commercial solution, if available, would be the most cost effective solution.
- Performed an extensive analysis of over 30 different COTS products, and identified and rank-ordered several that would meet requirements with configuration and/or customization. Developed and employed a multi-attribute decision model to identify and evaluate each of the potential products against key criteria.
- Wrote the Statement of Work (SOW) for the Request for Information and Proposals (RFI/RFP), and served as technical advisor to the vendor selection team.
- Served as program manager and provided IV&V services, managing and coordinating the efforts of two separate implementation vendors.
- The IRIS program was highlighted in the July 2004 issue of ESRI's ArcUser Magazine, as well as being the subject of a presentation at the August 2004 ESRI Users Conference.
- Applications Implemented: Accela Automation; AvantGo Mobile Database; Documentum Enterprise Content Management (ECM) Platform; ESRI ArcGIS 8.3, ArcIMS, ArcSDE; Primavera P3e; SAP R/3 Release 4.6.

Solution Architect / CRM Subject Matter Expert, U.S. Internal Revenue Service, Washington, DC; 2001

Architect and SME for the implementation of PeopleSoft 8 CRM for a federal government agency.

- Developed a series of prototypes using PeopleSoft 8 CRM.
- Conducted a gap analysis of the PeopleSoft 8 CRM suite (Help Desk, Interaction Management, Marketing, Sales, Support) by using scenarios of existing business processes to develop business object models, and linking those models to the PeopleSoft application and database schema.
- Worked with the user community to develop screen designs (user interface requirements), and translated them into requirements for application configuration and customization; developed the initial user interface prototypes using Macromedia Dreamweaver UltraDev and HTML.
- Applications Implemented: Macromedia Dreamweaver UltraDev 4.0; PeopleSoft 8 CRM Help Desk, Interaction Management, Marketing, Sales, and Support.

Answerthink Inc. / The Hackett Group, 1999-2001. National Director, Oracle CRM Practice and Eastern U.S. Regional Director, Oracle Solutions. Managed a \$20M profit and loss statement and grew the business to \$27M. Developed and managed senior level (VP/CIO) client relationships; provided thought leadership as a key presenter along with Oracle and HP for an executive breakfast series conducted at various national locations; managed master service agreements (MSA),

statements of work (SOW) and change requests; attained P&L targets through a combination of existing business contributions and new business development; established effective pricing and staffing levels for each client; orchestrated cross functional teams to achieve strong client results; generated invoices and collected fees; conducted contract negotiations; achieved recognizable improvements in the skill level and P&L performance of the area and service line. Key projects completed during this time period include the following:

Project Director, Resolution, Inc. / Reso Direct, South Burlington, VT; 2000

Project Director for the implementation of Oracle 11i CRM and ERP applications for an order fulfillment company.

- Managed the design and implementation of a CRM, financial and manufacturing automation system based on Oracle ERP 11i.
- Applications Implemented: Oracle 11i Accounts Payable, Accounts Receivable, Bill of Materials, Cash Management, Fixed Assets, General Ledger, Inventory, Order Management, Work in Process.

CRM Solution Architect, Citibank, New York, NY; 2000

Solution Architect for the evaluation and selection of an enterprise-wide CRM solution for the Global e-Business Unit of a Fortune 100 financial services company.

- Analyzed vendor (Siebel and Oracle) proposals and product documentation against both functional and technical requirements to determine a “best fit” solution; estimated the extent and cost of customizations needed to meet the remaining requirements.
- Applications Implemented: Oracle 11i Contracts, Sales Online, Service; Siebel 2000 Mobile Sales, Sales, Service.

***iMALL, Inc., 1999-2000.** Independent Regional Consulting Manager for a NASDAQ-traded electronic commerce company. Held day-to-day responsibility for marketing, sales and service within a region encompassing 12 states plus the District of Columbia. Provided training, professional development and operational support for over 400 sales consultants.*

***Oracle Corporation, 1996-1999.** Practice Manager, Eastern U.S. CRM Consulting Service Line Leader; Program Manager; Strategic Services CRM Consultant. Managed a service line of over 50 consultants. Served as program manager or solution architect on key engagements as part of the delivery team. Performed Solution Value Assessments (SVA) and developed business cases for other select engagements as part of the sales team. Worked with Oracle’s product marketing department to develop the key feature points and value proposition for Oracle CRM applications; developed content for Oracle’s official EBS (E-Business Suite) marketing collateral. Key projects completed during this time period include the following:*

CRM Solution Architect, Teradyne Corporation, Boston, MA; 1999

Solution Architect for the implementation of Oracle CRM applications for an NYSE-traded supplier of automatic test equipment.

- Analyzed the company’s current marketing, sales, order fulfillment and customer service business processes; identified \$15 million in annual enhanced revenue opportunity for the company through implementation of Customer Relationship Management (Oracle CRM) applications.
- Designed a new order fulfillment process for the company that reduced cycle time from 2-3 weeks to 2-3 days; developed a solution map for the configuration of Oracle Order Entry, Accounts Receivable, Product Configurator and Sales Compensation.
- Applications Implemented: Oracle 11 Order Entry, Accounts Receivable, Product Configurator, And Sales Compensation.

Program Manager, Marubeni America, Memphis, TN; 1997-1998

Program Manager for a 200-site Oracle ERP / HR applications implementation, custom development and data warehousing program for a Fortune Global 10 trading company.

- The program included implementing the full suite of Enterprise Resource Planning (Oracle ERP) applications, Oracle HR/Payroll and Data Warehousing, and runs at four divisional sites, four manufacturing plants and Point of Sale (POS) systems running at over 180 distribution points located throughout the United States.
- It also included SSI Agvance Mapping, an industry-specific GIS application for the agriculture industry.
- Applications Implemented: Oracle 10.7 Accounts Payable, Accounts Receivable, Bill of Materials, Cash Management, Fixed Assets, General Ledger, Inventory, Order Management, Work in Process; SSI Agvance, Agvance Mapping.

CRM/ERP Solution Architect, DeLorme Mapping Corporation, Yarmouth, ME; 1997

Solution Architect for the implementation of Oracle CRM and ERP applications for a mapping products, technologies, and data company.

- Identified over \$10 million in cost savings and increased profits.
- Conducted a series of “future vision” workshops and interviews with executives and employees throughout the company.
- Identified 40 initiatives in the Sales and Marketing, Order Generation and Execution, Order Shipment, Accounts Receivable and Customer Service functions, representing over \$10 million in cost savings and profit potential.
- Developed a solution map for the configuration of Oracle CRM Sales and Marketing (OSM), Order Entry, Accounts Receivable, and Service.
- The recommendations included those focused on digital distribution of GIS/mapping products. Applications Implemented: Oracle 10.7 Accounts Receivable, Order Entry, Sales and Marketing, Service.

CRM/ERP Solution Architect, Cablevision Systems Corporation, Woodbury, NY; 1996

Solution Architect for the implementation of Oracle CRM and ERP applications for an NYSE-traded media, entertainment and telecommunications company.

- Managed an assessment of financial business processes.
- Led the analysis of the Accounts Receivable, Inventory, Order Entry and Bill of Materials functions. Recommended process changes that reduced the company's costs per invoice processed by nearly 40 percent.
- Developed a solution map for the configuration of the corresponding Oracle ERP applications.
- The recommendations included those focused on GIS/GPS integration with back office systems to enable enhanced customer service and technical support capabilities.
- Applications Implemented: Oracle 10.7 Accounts Receivable, Bill of Materials, Inventory, Order Management.

Computer Sciences Corporation, 1994-1996. Business Process Re-Engineering Project Manager and Solution Architect. Retained by CSC's Systems Engineering Division to provide core BPR project management and solution architecture services during the re-engineering surge immediately following the publication of the book Reengineering the Corporation (written by CSC and Harvard-affiliated co-authors.) Key projects completed during this time period include the following:

Solution Architect, U.S. Department of Agriculture, Washington, DC; 1994-1996

Solution Architect for the implementation of custom-developed CRM, loan processing and financial information reporting applications for a federal government agency.

- Re-engineered operational processes, replacing outdated manual systems with solutions incorporating automated data collection, Electronic Data Interchange, automated quality control and desktop publishing.
- Developed IDEF0 and process/organization models of the existing (current or "as-is") business processes; conducted critical path analyses to determine process duration and bottlenecks; developed Activity Based Costing (ABC) models using Microsoft Excel and used the models to determine the cost for each activity; developed "straw man" redesign alternatives based on best business practices; facilitated workshops with client personnel to determine objective (future or "to-be") business processes; completed the IDEF0 models, critical path analyses and ABC analyses for the preferred alternatives.
- The redesigned processes reduced costs by over 50 percent, and reduced end-to-end cycle times by over 60 percent.
- Applications Implemented: Microsoft Visual Studio, Oracle 7.1, Oracle CASE, Oracle Forms and Oracle Reports.

Developed an evaluation plan to support the selection and re-engineering of core business processes at over 2,500 United States Department of Agriculture field sites. Devised a multi-attribute decision model that was used to rank and prioritize core business processes for re-engineering projects. This project directly implemented recommendations of the National Performance Review.

KPMG Consulting, 1992-1994. Consultant, Federal Systems Group. Conducted Independent Verification and Validation (IV&V) assessments of development efforts and IT organizations; conducted analyses of the key business processes relating to the organizations' system development activities; made key recommendations in the areas of life-cycle management, quality assurance and testing.

U.S. Army (Information Systems Engineering Command), 1983-1992. Responsible for QA and testing programs for all enterprise-wide personnel and engineering management systems within the Department of the Army. Managed QA protocols for systems up to and exceeding \$1 billion in cost; provided direct input to system milestone decisions at Department of the Army level; developed the Test and Evaluation Master Plan format used for all Army Automated Information Systems; provided direct input to DOD on information systems QA and testing policy. Military service - United States Army (Major/O-4) and United States Marine Corps (Graduate, Officer Candidate School).

CERTIFICATIONS

- Microsoft Certified Professional (MCP)
- Oracle Certified Professional (OCP) - R11 CRM and Financial Apps
- Project Management Professional (PMP) - ID# 35684
- SAP Solution Manager Certification (C_SMI310_04)
- Siebel 2000 Certified Business Analyst

EDUCATION

Master of Science (MS) in Systems Management, University of Southern California (1990)

Master of Liberal Arts and Sciences (ALM), Digital Media Arts and Sciences, Harvard University (In Progress)

Bachelor of Arts (BA) in Geography, West Texas Agricultural and Mechanical University (1983)