

Career Summary

A Lead Functional Consultant with more than 20 years' experience in business & data analysis with a heavy emphasis on configuration of Microsoft Dynamics solutions. One of my key strengths is my ability to gain the confidence of the business community and ensure their requirements for any business changes are captured, agreed, and met. I have excellent communication skills, enabling close relationships with staff and vendors at all levels.

Educational Summary & Technical Skill Set

2007 – Present	MB-220 Certification in Microsoft Dynamics 365 for Marketing, Microsoft Dynamics 365 Customer Engagement, Out bound and Realtime Marketing, Field Service, Sales
2000 – 2002	Master of Science Business Information Technology – Merit University of Westminster, London
1993 – 1998	Bachelor of Commerce Human Resource Management & Marketing Saint Mary's University, Canada

Recent Programme Experience



Implemented Dynamics Marketing. As Functional Lead we implemented and configured the key features of MDM:

Marketing applications, managing segments and lists, marketing forms and pages, managing leads, contacts, and accounts, creating, and managing marketing email messages, customer journeys, managing events and webinars, configuring Dynamics 365 Customer Voice



Mid-flight implementation of Dynamics Sales and Customer Engagement & Marketing. Functional Lead implementing and configuring the following features:

Lead and Enquiry management, Opportunity pipeline business processes, SLA, SLA KPIs, Routing and Queue configurations, Business Rules, Probability modelling from lead to opportunity, Marketing applications, managing segments and lists, marketing forms and pages, managing leads

Employment Details

September 2022 – present

Tribal – Senior Professional Services Consultant

Tribal is the leading student information solutions provider in Higher and Further Education. They provide a deep understanding of leading practices in student management and delivering an exceptional digital student experience.

- End to end implementations in Microsoft Dynamics 365 CE across modules such as Sales, Marketing, and Higher Education
- Architecture and Design of Microsoft D365 Solutions including (but not limited to) Dynamics CRM, Power Platform, and wider D365 Platform
- Client Consultancy and Workshops capturing requirements and technical design needs.
- Implementation & supporting of D365 Solutions
- Delivery of training and client workshops in support of our solutions, building trusted client relationships, mentoring, and training of team members

March 2022 – September 2022

Investec – MS Dynamics 365 Functional Consultant

Investec is an international banking and wealth management group. It provides a range of financial products and services to a client base in Europe, Southern Africa, and Asia-Pacific.

- Business process mapping, modelling, and documentation knowledge
- Develop, design, and implement Microsoft Dynamics 365 solutions as part of both project-focused and business as usual work streams Deployment, upgrades, and production support on systems for the application
- Managing business change i.e., Workforce Engagement, Change Impact Assessment, Change Readiness & Training Plans.
- Analysing & documenting integration mappings
- Codeless automation (workflows, business rules, power automate)
- Facilitating workshops, gathering, and documenting requirements, translating requirements into business processes and creative thinking.

January 2021 – March 2022

Pro-Strategy - MS Dynamics 365 Functional Consultant

Pro-Strategy is a Gold Certified Microsoft and IBM Partner and recognised as the leading IT Technology Partner in Ireland.

Specifically, this role involves:

- Gathering customer requirements and defining a product backlog
- Exciting the clients SMEs about the “art of the possible” through demonstrations to show how the breadth of Dynamics 365 can add value to their business
- Influencing the solution design with a configuration first approach to minimise implementation and maintenance costs
- Configuring D365 Client Engagement, Sales, Field Services and Marketing solutions in line with requirements
- Providing strategic & operational support to enable transformation with best practices in mind, low code no code approach
- Scrum Master and/or Scrum BA for internal CRM system

December 2019 – December 2020 **COGNITA – MS Dynamics 365 Functional Consultant**

Cognita is a global private schools' group which owns and operates schools throughout the United Kingdom, Hong Kong, Singapore, Spain, Switzerland, Thailand, Vietnam, Brazil, India, and Chile. They have embarked on a Dynamics 365 implementation because of a globally recognised need to improve the customer admissions journey across all schools. As a member of the build and delivery team, I was involved in the end-to-end project lifecycle making me one of the primary points of contact for stakeholders in documenting requirements and defining the product backlog.

February 2019 – December 2019 **Cloud Source – MS Dynamics 365 Functional Consultant**

Cloud Source as a MS Partner are consultants at several clients who have embarked on the D365 path. This role predominantly entailed working at the Nursing and Midwifery Council, whereby, as a functional consultant, I collaborated with the NMC to identify, explain, design, and implement the right solutions and processes for the implementation. Working as subject matter expert and trusted advisor in Microsoft Dynamics 365 related, I advised in business terms about how to transform their business in line with the capabilities of Microsoft Dynamics 365 and translate it into the functional and technical requirements for our Dynamics 365 developers working to implement the solution.

November 2018 – January 2019 **L&Q – MS Dynamics Functional Consultant**

L&Q undertook a D365 transformation programme which included an implementation D365 for Customer Engagement. The contract opportunity involved working in the functional design of business process solutions which included elements of business analysis, client engagement, solution design and team leadership.

April 2015 – October 2018 **JLL – MS Dynamics Product Engineer**

Provided product specialisation as part of day-to-day activities and when assigned project deliverables. Worked with the JLL business, IT community and any relevant product vendors to understand requirements and work to design, configure and deliver technology solutions that met the business needs within the product ecosystem.

February 2012 – April 2015 **IBM: Formerly Optevia Limited – MS Dynamics Consultant**

Working with customers (*Axis Insurance, Home Office, HS2, Epsom Council, etc.*) to identify their business requirements, and discover, document, and analyse key organizational processes. On a day-to-day basis, with Optevia's team I effectively planned and documented project phases, and managed ongoing development of functional specifications through discovery, implementation, testing, deployment, and training. I provided training and ongoing support for customers: report building, data quality, and new integrations with Microsoft Dynamics CRM.

August 2011 – December 2011 **Barclays Wealth – MS Dynamics CRM Trainer**

The team ensured the training and development needs of the CRM software were being assessed and then met/exceeded. This position was instrumental in the design, development, rollout, and evaluation of the CRM training program while building constructive and effective relationships at all levels.

January 2011 – August 2011

Maternity Leave

September 2007 – December 2010

Jones Lang LaSalle – MS Dynamics CRM Consultant

July 2007 – August 2007

Re-locating to England

June 2006 – June 2007

IBM World Trade Organisation - Project Manager