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**Executive Summary:** Seasoned Program/Project Manager and Professional Services Consultant, offering professional services for Cloud Solutions & Implementations, BI, Forecasting & Predictive Analytics, Reporting, KPIs, Dashboard Design Process and Web Integration. Experience leading multi-faceted, seamless, end-to-end implementations and integrations into organizations; re-engineering of IT infrastructure; streamlining/automating workflows/approvals significantly improving organization's CX, processes and efficiencies.

**Experience**

* **Principal Owner | Technical Program-Project Manager | BI Expert | Professional Services Consultant 7/1997 – Present
SelMil Project Management Consulting, San Francisco, CA**I am a seasoned Technical Program/Project Manager specializing in strategic planning and consulting services, Cloud & SaaS Solutions Designs, helping organizations align their business processes/model and technologies for continuous and seamless scaling ability. I accomplish this goal through digital transformation, business processes review and optimization, cloud solution design, infused with better KPIs & enhanced Business Intelligence - reporting, forecasting, predictive analytics and blended AI/ML (combination of bots, automation, AI/ML, coupled with human interaction).
* **Technical Program/Project Expertise:** Planning & execution, triple constraint management (schedule, budget & resources), scope and requirements management, corporate governance management, change request management, stakeholders’ relationship management, risk mitigation & management, vendor relationship management and status reporting management.
* **Stakeholders’ Relationship & Cross-Functional Team Leadership:** Lead and coordinate development efforts between internal business and development teams, ensuring business needs are translated into technology requirements. I drive execution (planning, coordination, project management) of technology projects from ideation through launch.
* **Critical Analysis:** Think globally, strategically & analytically - anticipating barriers, weighing the costs and benefits of various solutions, balancing business needs with technical constraints. I provide crucial oversight and insight across programs/projects.
* **Collaborator| Influencer| Results Driver:** Partner with cross-functional leadership to build highly collaborative teams and facilitate compromises across teams and stakeholders.
* **Think Big and Small:** Look for scalable solutions to innovate the organization, understand larger, interconnected programs/projects and cross-product dependencies, manage programs/projects at a high level to help individuals and teams deconstruct problems into smaller solvable solutions.
* **Possess Strong Analytical Skills** – Dashboards, Reporting, KPIs, OKRs, AI & Machine Learning.
* **Data and Impact Driven:** Identify metrics that quantify success & use metrics to understand team and program/project impact.
* **Knowledgeable In Enterprise Technology Implementations** – metrics gathering, design & implementation, rollout, UAT, business processes, core values alignment and workflows/approvals design.
* **Adept in Change Management** – Individual & Organizational.
* Lead multi-faceted, seamless implementations into organizations and/or re-engineering of IT infrastructure, streamlining and automating workflows with significant improvement to organization's productivity and cash flow.
* Lead cross-productive improvement initiatives.
* Lead cross-functional teams to deliver and achieve measurable returns in organizations (KPIs).
* Effective communicator and presentations to C-Level sponsors, Steering Committees and cross-functional stakeholders.

**Sampling of Large Managed Initiatives:  Project Duration:**

* **Consultant – Salesforce Program Manager 18 months**

**State of California (Dept. of Social Services)**

Retained to lead the digital transformation of DSS by providing project management; business analysis; requirements gathering; use case design; GAP analysis; design, configure and implement Service & Community Clouds; configure and implement Einstein AI; provide end-user training; knowledge transfer and change management (organizational & individual), ensuring user adoption.

* **High Level Sampling Of Deliverables/Milestones:**
* Centralized Repository providing a 360-degree holistic view of clients.
* Define, Improve & Automate Client’s Onboarding Application Process.
* Forms Development/Templatization.
* Program Budget Management Collaboration.
* Compliance (Federal).
* Contract Management Automation.
* KPIs & Dashboards.
* Analytics and Predictions (Einstein AI).
* **Provided Program/Project Management:** Critical Analysis Management; Scope & Requirements Management; Planning, Execution & Change Management; Project Documentation Creation - SOW, Project Charter, Communication Plan, Change Management Plan, etc.; Risk & Issue Mitigation Management; Governance Management; Stakeholders Relations & Cross-Functional Team Management; Monitoring & Status Reporting; Resource Management and Vendor Relationship Management.
* **Marketing Automation/Operations - Technical Project Manager 9 months
Nimblefish | RR Donnelley Company, San Francisco, CA**

Collaborated w/ engineering and development teams to coordinate and track activities in developing the Nimblefish Marketing Engine application. Supported the Engineering Manager in developing the Nimblefish Marketing application and migration to AWS platform.

* Created project plans for implementations and operational projects.
* Created standard project documents (project charter, project plan, budget, communication plan, etc.); understood and reinforced project objectives and created metrics to measure success against the objectives/outcomes (OKRs).
* Managed activities set forth in the project plan; monitored progress toward each milestone and deliverable; managed risk; developed contingency plans; communicated project status and critical risk factors to management and stakeholders; and escalated issues, as necessary, to adjust project scope, resources and schedule.
* Identified future resource constraints and provided solution to the same.
* Coordinated release activities with IT & Engineering Teams.
* Helped to refine project management processes and policies.
* Collaborated with Engineering and QA teams to ensure sustainable delivery of services.
* **IT Operations Program/Project Manager 9 months
CNE Media LLC, San Francisco, CA**

Contract as a Program/Project Manager to shape, prioritize and scale the IT Operations Group, DevOps and scope their respective projects. Facilitated and collaborated on the design and architecture for long-term and immediate solutions to stagnant projects. Drove the design and architecture through implementation and rollout in an Agile (Kanban) fashion.

* Established structure for DevOps & Ops Engineering development cycles by creating infrastructure and processes to help support initiatives.
* Managed the DevOps & Operations projects for both internal team and outsourced resources.
* Assessed internal processes to identify opportunities to increase productivity and efficiency.
* Collaborated with project teams, created and maintained project plans and schedules, including milestones/deliverables across all impacted areas of the project.
* Collaborated with Engineering and QA teams to ensure sustainable delivery of services.
* **Program Lead | Professional Services Consultant** **14 months**  **Findly Talent, LLC | A Symphony Technology Group Company** **(M&A of Bernard Hodes Group), San Francisco, CA, New York, Texas, Massachusetts & New Zealand**
**Salesforce Re-Engineering | Salesforce Native Partners Integrations | NetSuite (ERP & RevRec Configuration):** This initiative replaced the client’s proprietary Account Management System with a SaaS solution - addressed manual billing/invoicing, improved revenue recognition practices, provided better business intelligence insight, automated sales and contracting processes (O-2-C/CPQ), integrated a professional service automation (PSA) tool, improved communications and collaborations tools, integrated a centralized client data repository (Box.com), eliminated disparate systems, improved and standardized business processes and stabilized the IT infrastructure.
* Proposed companywide implementation to replace legacy system currently used by Sales Group only.
* Managed Stakeholders: All C-Level types and senior executive management (15).
* Lead organizational process review in support of replacing legacy system - automating manual processes, creating workflows and approvals, creating BI tools for analytics, reporting and dashboards.
* Lead individual and organization change management in support of replacing legacy system - how to successfully ensure end-user adoption.
* Program Initiatives:
	+ - 1. Standardized and Automated IT Infrastructure and Business Processes.
			2. Centralized clients’ data into one unified system – Salesforce & NetSuite.
			3. Improved Analytics/Forecasting, Reporting & Dashboarding.
			4. Eliminated Disparate & Redundant Systems.
			5. Improved Communications & Collaboration Tool into solution one system - Chatter (Salesforce).
			6. Created Web Interface for Customers and Vendors (portals).
			7. Improved Connectivity.
			8. Enhanced Security Features, especially around the integration points.
			9. Remediated & Improved Storage and Back-Up. (Cloud Solution)
* **Contracts & Technology Administrator 10 months
The Arc San Francisco (Non-profit), San Francisco, CA**

This position supported the organization in all pre and post-award contract administration activities, ensuring contact processes and deliverables are compliant with The Arc and client-funders' expectations and standard policies and procedures. This position was primarily responsible for the organization’s contracts and services billing. The Contract Administrator served as a contract resource for the organization and a primary point of contact with its funders for contractual issues. The Contract Administrator ensured proposal preparations and contract executions were thorough and timely. The Contract Administrator developed, negotiated and executed complex agreements with team partners, funders, clients and subcontractors to facilitate short/long term business goals. Additionally, this position served as the primary point person for all technology and computer related matters, such as network and server activities and IT Help Desk support at the organization’s multiple sites.

* Direct report to CFO.
* Responsible for $1.2M monthly billing/invoicing to various state agencies and local business organizations.
* Implementing best practices to stabilize network.
* Supervised and managed the IT MSP.
* Served as Project Manager for Salesforces Field Management Lightning.
* Served as a member of the organization Leadership Team.
* **Technical Program-Project Manager 14 months**

**ThreatMetrix (TMX), Inc., San Jose, CA, Canada, Australia & Europe**

**Salesforce Re-Engineering | Zuora Integration | NetSuite ERP:** Assisted TMX w/ a multi-phase Salesforce Integration, to address subscription (recurring) billing | CLM (Order-2-Cash) processes. Phase I: construct a business case for integrating a Recurring Revenue/RevRec solution with their Salesforce instance. Phase II: manage the RFP/RFQ process. Phase III: write uses cases and product specs. Phase IV: devise Project Plan, prepare SOW, design baseline budget and manage offshore development team. Phase V: Configured the software per use cases, manage vendor relations, design BI module (reports, install business forecasting analytics tool, create dashboards, etc.) and designed Vendor/Customer Portal. Phase VI: Trained end-users and System Administrator, maintenance/upkeep and provide ad hoc services.

* eCommerce rollout for US HQ and International Offices.
* Cross-functional/cross-company implementation – Sales, Accounting/Finance, Engineering & Customer Support Services.
* Agile/Lean Methodology Implementation, leading an internal team (8 members), an external team (3) and the offshore development team.
* Performed Stakeholder Analysis for Business & Use Case Design.
* Stakeholders – CFO, VP for Accounting/Finance, VP for Sales, VP for Worldwide Engineering, VP for Applications and Director of Customer Support Services.
* Lead process review and re-engineering of same to support new e-Commerce platform.
* Gathered metrics for system design, integration and software configuration.
* Designed/Managed the schedule and budget.
* Retained/Managed resources – offshore development team and software vendors.
* Instituted best practices.
* **Salesforce Consultant 9 months**

**Spectrum Settlement Recovery, LLC, San Francisco, CA**

**Salesforce Re-Engineering:** Worked with department heads to build out workflow rules and approval processes based on business processes/rules, built/designed custom objects to associate contacts’ claims information with proper opportunity, created custom links, wrote Perl scripts to extract data and update other company databases, set-up APIs to automate weekly reporting, designed custom reports for revenue forecasting, configured the customer portal, re-trained end-users on best practices, set-up dashboards, scrubbed/normalized data and instituted protocols to maintain data integrity. Secondly, I prepared clients’ financial documents, pertaining to the Visa/MC Class Action, for statistical analysis to determine present value.

* Company liaison between Salesforce Product Manager and VAR for the remediation of Salesforce.
* Lead process review with Department Heads (stakeholders) for re-engineering Salesforce. Defined the technical specifications, including use cases, based on the process reviews.
* Agile/Scrum implementation, leading a team of twelve, including an offshore team in India.
* Project Plan, Scope, Risk & Scheduling done in accordance with PMBOK and SDLC.
* Designed and wrote scripts to automate weekly reporting, e.g., revenue forecasting, open claims status, transfer client data from Self-Service Portal to the appropriate Opportunity, etc.
* Set and managed risk controls.
* Responsible for Change Requests.
* **IT Project Manager | Project Control Officer 18 months**

**Lawrence Livermore National Laboratories, Livermore, CA**

As Project Control Officer, I served in an oversight role for two (2) Project Managers for the rapid application design (RAD) and follow-on development/implementation of ARES Estimating/Project Management Software Tool for construction cost estimating/budgeting, baseline scheduling (critical path) and resourcing.

* **Managed the project roadmap** to meet the project strategic deliverables and milestones.
* **Expectation & Alignment** -Ensured accountability by keeping Project Managers updated and informed of project status and changes to scope.
* **Status Reporting** – primary source for updating stakeholders on project status – costs, schedule, resources, risks, deliverables, milestones and release/testing.
* **Project Execution –** Instructed Project Managers on Project Initiation, Project Planning, Project Delivery, Project Controlling & Project Closure.
* **Resource Planning –** Assisted PM’s in devising resource/allocation plan and assignment to planned tasks.
* **Business Process Review -** Moderated business rule/processes review, ensuring alignment with project initiative.
* **Interdependencies –** Reviewed and prioritized tasks, deliverables & milestones.
* **Earned Value Managed (EVM) -** Kept schedules and budget updated to monitor the overall health of the initiative - CPI, SPI & CR.
* **Vendor Management -** Collaborated with the VAR, defining software customization specifications.
* **Rapid Application Design –** Managed the rapid design of the ARES software for presentation the Lab & Department of Energy representative for approval to develop & deploy.
* **Change Requests –** Managed Change Request Board.
* **Project Budget Managed/Coordinated:** ~ $1.2 Billion.

**Education & Credentials**

Texas A&M University, College Station, TX, BS, Social Psychology **(Major)**/Applied Mathematics **(Minor)**

SFDC Admin 201 Certification, September 2014- Present

**Military Service**

US Navy (Active Duty)

**Technical Skills**

**Channels (Verticals):** e-Commerce, Financial Services, Government, HCM, Insurance, Legal, Media, Retail & Telecoms. **Domains:** Contract Lifecycle Management,CPQ, DevOps, Ecommerce, Financial Services, HCM, Marketing Automation, Microsoft Technologies, Order-T0-Cash, PLM, Quote-To-Cash, Revenue Recognition, SDLC, Sales Force Automation (SFA) & Subscription (Renewal) Billing. **SaaS Implementations**: Apttus (CPQ & Order-2-Cash), Eloqua, FinancialForce (ERP & PSA), Marketo, MS Dynamics (CRM & ERP), NetSuite, Oracle Financials, Salesforce (Sales, Service, Community & CPQ Clouds) & Zuora Subscription Billing. **BI | Reporting | Predictive Analytics:** Google Analytics, SFDC (Wave) Analytics, Tableau & SQL Reporting. **Collaboration/Storage Tools:** Google Hangouts, Salesforce Chatter, SharePoint & Slack. **PPM Methodologies:** Agile, CI/CD, CMMI, ITIL, Kanban, Lean, RUP, RAD, SAFe, SRUM & SDLC.  **PPM Skills:** Change Management, Communications, Critical Analysis, Cross-Functional Team & Stakeholder Management, Governance, Project Planning (Strategy & Execution), Resources Planning, Risk & Issue Mitigation & Status Reports/Updates. **PPM Tools:** MS Project/Project Server, SharePoint, JIRA & Confluence, Basecamp, Excel & Rally. **Web Technologies:** JavaScript, JSON, HTML, HTTP, CSS, APIs, Rest, SOAP, etc. **Platforms:** Salesforce, AWS, MS Azure & Google Cloud.