

GERALD RICCIARDI

SALESFORCE CPQ PRINCIPAL CONSULTANT & PROJECT LEAD

5X SALESFORCE CERTIFIED | SALESFORCE CERTIFIED CPQ SPECIALIST | CERTIFIED SCRUM PROFESSIONAL (CSP)

Helping Companies Sell More, Sell Faster, and Sell More Profitably with Salesforce

For over 17 years, I've helped businesses around the world discover and deploy new sales technologies that allow them to sell in new ways. I've led 20+ full-lifecycle CRM / CPQ / B2B E-Commerce projects with teams ranging from 5–25 people, budgets from \$50K to \$5M+, and timelines from 2 months to 2 years. My Salesforce experience includes 5 Sales Cloud CPQ projects (3 PROS, 2 SteelBrick) for global companies over the past 5 years.

EXPERTISE

Discovery: Helping leadership teams prepare for new Salesforce Sales Cloud and CPQ projects by crafting visions, creating strategies, building roadmaps, preparing business cases, securing buy-in, redesigning processes, writing RFPs, and evaluating vendors

Quick Start: Building Sales Cloud + CPQ Proof of Concepts (POCs) and Minimum Viable Products (MVPs) to get customers up and running quickly and to prepare them for pilots

Implementation: Leading Sales Cloud + CPQ activities including planning, budgeting, requirements gathering, design, development, testing, and rollout using Agile best practices

Industries include Banking, Communications, Enterprise Software (Cloud - SaaS, PaaS), Industrial Machinery Manufacturing, Insurance, IT Consulting, Retail, and Steel

EXPERIENCE

WingWalker Consulting – Salesforce CPQ Principal Consultant May 2015 - Present

- Currently helping small businesses (\$5M-\$15M annual revenue) in emerging markets quickly implement Salesforce Sales Cloud
- Completed projects for enterprise clients including **GE**, **UnitedHealth Group**, and **PTC**

PTC – CPQ Subject Matter Expert (Salesforce CPQ SteelBrick)

- Advised VPs and senior directors in critical CPQ / Quote-to-Cash areas including vendor selection, product vision / roadmap, and global rollout strategy for 900+ CPQ users
- Coached PMs and BAs on Salesforce CPQ implementation and Agile best practices
- Led workshops with sales, marketing, and finance teams to set scope and gather requirements for configuration, pricing, quoting, contracting, ordering, amendments, renewals, forecasting, and integration to Oracle EBS, Salesforce Communities, and Zuora

UnitedHealth Group – Scrum Master & Agile Coach

- Coached multiple teams within PMO on Agile (Scrum, Scrumban, Kanban, and SAFe)
- Served as a Scrum Master on big data analytics projects to improve call quality in a global contact center with 50K+ customer support representatives

GE – Senior Salesforce Project Manager & Advisor

- Led sales transformation consulting project to define vision, build business case, outline roadmap, determine requirements, secure buy-in, write RFPs, evaluate vendors, verify SOWs, and plan Salesforce Sales projects.
- Built Salesforce CPQ (SteelBrick) proof of concept to evaluate underlying technology
- Leveraged Agile Scrum framework to manage all consulting activities and deliverables

PROS – CPQ Project Manager (Salesforce) & Delivery Executive Oct 2012 – May 2015

- Led 3 full-lifecycle Salesforce Sales Cloud CPQ projects with a 10-person implementation team including 3 direct reports and with \$750K+ budgets. Customers included Accelrys, TransUnion, and Siemens BT. Largest rollout was designed to ramp up to 1500+ users.
- Served on PMO Advisory Council and rolled out Agile Scrum framework to CPQ PS team
- Served as Scrum Master and guided product visioning, product and sprint backlog creation, sprint planning, daily stand-ups, burndowns, demos, and retrospectives
- Served as the Delivery Executive on escalated projects and helped new project managers improve customer relationships and get engagements back on track

Yellow Phoenix Consulting – Principal & CPQ Project Manager Sep 2003 – Sep 2012

- Built and managed a 23-person consulting team that spanned Asia, USA, and Europe
- Led numerous \$10K+ B2C E-commerce and projects for online retailers using Agile.
- Completed projects for enterprise customers including **Cisco**, **Wells Fargo**, and **Rexnord**

Rexnord – CRM Configurator Lead & Solution Architect

- Built proof-of-concept systems to get everyone from end-users to C-level execs on board
- Led \$700K+ PeopleSoft CRM / B2B E-Commerce platform projects for 3 power transmission business including flat-top chain / sprockets, couplings, and gear drives
- Leveraged Agile (Kanban, TDD) framework to manage communications, develop project management plans, gather requirements, define scope, create WBSs, develop schedules, estimate costs, manage risks, manage app development and QA

Wells Fargo Home Mortgage – Senior Business Analyst

- Improved B2C retail lending product configuration, pricing, and underwriting processes
- Served as subject matter expert on rules-based management systems and rules engines

Cisco Systems – CRM Guided Selling Team Lead

- Led two \$1M+ CPQ/ B2B E-Commerce Guided Selling projects to support 8 product lines
- Gathered requirements and rules from product experts, sales teams, and service teams

Blue Cross Blue Shield Florida – Senior Business Analyst (Contract) Sep 2002 – Sep 2003

- Gathered, verified, and documented insurance underwriting business rules and product quoting requirements from a variety of subject matter experts across 3 lines of business

Steel24-7 – Configurator Technical Lead & App Architect (Contract) Jan 2001 – Sep 2002

- Led \$250K+ CRM / B2B E-Commerce Configure-to-Order app projects for 4 business units.
- Managed software development activities including scoping, planning, requirement gathering, architecture design, programming, testing, and training using Agile FDD

Calico Commerce - Senior CPQ Implementation Consultant Aug 2000 – Jan 2001

- Designed and developed CRM / B2C E-commerce CPQ apps for Staples and Gateway

GE Capital Info Mgmt. Leadership Program – Systems Analyst

Aug 1999 – Aug 2000

Atlanta, GA | Stamford, CT

- Gathered requirements and built CPQ applications for financing and leasing businesses

EDUCATION

BSBA w/ MIS concentration, Boston University Questrom School of Business, 1995–1999

CERTIFICATIONS

Salesforce: CPQ Specialist, Salesforce CPQ (SteelBrick) Brown Belt, Sales Cloud Consultant, Administrator, Platform App Builder, Platform Developer I

Agile: Certified Scrum Professional (CSP), ICAgile Certified Professional in Agile Coaching (ICP-ACC), PMI Agile Certified Professional (PMI-ACP), Certified ScrumMaster (CSM), Professional Scrum Product Owner I (PSPO I), SAFe Agilist (SA)

Project Management: PMI Project Management Professional (PMP)

Other: Six Sigma Green Belt, Apttus Quote-to-Cash Certified

HANDS-ON TECHNICAL SKILLS

Salesforce Sales Cloud + SteelBrick CPQ: Opportunities, Quotes, Guided Selling, Quote Line Editor (QLE), Custom Actions, Bundles, Dynamic Bundles, Constraints, Product Rules, Pricing Rules, Lookups, Contract Pricing, Multi-Dimensional Quoting (MDQ), Advanced Approvals, Discounting, Contracting, Amendments, Renewals, Quote Templates, Localization

Salesforce App Cloud: Apex, AppExchange, Application Lifecycle Management, Approvals, Chatter, Cloud Flow Designer, Data Loader, Developer Console, Force.com, Force.com IDE, Lightning App Builder, Lightning Components, Lightning Design System, Managed Packages, Process Builder, Report Builder, Salesforce1 Mobile App, Schema Builder, SOSL, SOQL, Triggers, Workbench, Workflows, Visualforce,

E-Commerce: Amazon Pro, Magento, OsCommerce, WooCommerce

Marketing Tech: AWeber Email Marketing, Facebook Ads, Google Ads, Google AdSense, Google Analytics, Google Keyword Planner, Search Engine Optimization (SEO), WordPress

Other CPQ: SAP VC (Variant Configuration), SAP MM (Materials Management), SAP SD (Sales and Distribution), SAP IPC (Internet Pricing and Configurator), PROS/Cameleon, PeopleSoft Order Management

Microsoft Office: Access, Excel, MS Project, Outlook, PowerPoint, SharePoint, Word

Web: Axure RP7 UI/UX, CSS, ETL, Git, HTML5, Java EE, Java, JavaScript, jQuery, JSP, MySQL, PaaS, PHP, SaaS, SOA, SQL, Web Services, WebLogic, XML

Agile Tools: Jira, Salesforce Agile Accelerator, Rally / CA Agile (Flowdock, Rally Insight Analytics, Rally Portfolio Manager, Rally Unlimited)

Project Management: Clarity, MS Project, NetSuite OpenAir, Visio, Roadmunk

US Citizen. Open to relocation or 100% travel. Corp-to-Corp contracting only please.