

resume of Jeff Lambert

www.linkedin.com/in/jeffreylambert

summary

Over my career I have worked in large and small businesses across a variety of industries from financial services to manufacturing to biotechnology. I have held positions with responsibilities ranging from individual contributor through management. And I have performed a wide range of functions including software development, project management, customer service, desktop support manufacturing assembly, bookkeeping, photography and real estate sales. My wide range of experience provides me the aptitude to understand the many facets of a business, permitting me the ability to properly analyze and act on tactical and strategic business needs.

experience

BlackRock, San Francisco, CA

7/13 to present

Vice President

Client Data Acquisition Senior Software Engineer: Responsible for all aspects of acquiring and integrating data from various business areas and outside sources into our Hadoop-based systems and related reporting environments, making the data available for canned reporting and ad hoc analysis work. Authored a Python pipeline application to standardize and simplify the adding of new data and in a way that allows an in-house job scheduling tool to easily call a function to manage the ingestion, ETL and/or outputting of data.

Client Analytics Product Manager: Responsible for the requirements gathering, project initiation and management of the first big data solution for the US Wealth Advisory retail sales and marketing groups. This first stage includes consumption and transformation of CRM and financial sales and asset data into a HortonWorks Hadoop infrastructure. The initial end product will include profile reporting as well as sales opportunity identification and deeper sales reporting. Longer term plans will be to remove the data silos that exist and provide for better use of the resulting centralized data.

CRM Product Manager: Responsible for the support and continued growth of the SalesPage CRM system within the US Wealth Advisory division of BlackRock. System supports 300+ wholesalers including territory management and transfer agent data processing and integration. Additional duties include new requirements documentation and implementation as well as involvement in other retail sales and ops products. This includes new integrations as well as more strategic planning around CRM system consolidations.

JVHM, Inc., Castro Valley, CA

4/99 to present

Founder: JVHM, Inc. jvhm.com, is a software development and consulting firm specializing in CRM systems and customized client/server applications. In addition, JVHM is heavily invested in designing and developing web sites and other online content. Current expertise includes SalesLogix, Salesforce, MS SQL Server, Sybase ASE, WordPress, PHP, MySQL, XHTML, CSS.... Current tools utilized include Adobe CS4, ZendDesk, SVN, Asana, Toggl, Jira, BaseCamp. Past engagements also included extensive work with PowerBuilder, ERWin, Sybase PowerDesigner and Oracle 8.

Accomplishments

- Globally implemented, customized, upgraded and supported SalesLogix with a financial services firm that managed over \$2 trillion in assets under management. The implementation supported 800 users, spanning various sales channels across five globally dispersed offices, a call center, several satellite offices and 75 remote users. The system also integrated, via direct scripts and messaging, with downstream and upstream systems both internal and external to the client. Automated application monitoring, scheduled tasks and data integrity routines also were implemented to help manage systems. Tools utilized included SalesLogix Architect, Administrator, Sync Server and Remote Office Server, MS SQL Server 2005 and Sybase ASE databases including custom tables, triggers and views, external VBScripts, IBM MQSeries, Javascript, Visual Analyzer (iReports), Crystal Reports, MS Task....

25159 Century Oaks Circle, Castro Valley, CA 94552

510.275.8000 bus

530.830.9021 google voice

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experience

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- Managed several Salesforce implementations including the implementation of Salesforce for a biotech manufacturer that included data migration from multiple systems, coordination with ERP integration vendor, technical and non-technical case support, sales quote enhancements, end-user and admin training....
- Extensive experience engaging with clients to design and develop online resources including web sites, Facebook Pages.... Maintenance and support, SEO and related services also are provided. Our WEBphysiology.com and BusinessCapsule.com sites are utilized to service this sector. Specialty is custom WordPress powered web sites.
- Designed and developed various database schema objects and system integration scripts to support the development of a custom web based pipeline reporting tool for a large financial services firm. Databases utilized included both MS SQL Server 2005 and Sybase ASE. Integration scripts were written within the SalesLogix environment.
- Designed and developed a database schema and GUI for a sales management system that supported the institutional channel of a financial services sales organization. This tool included detailed client information retrieval, an advanced query tool and a holdings scenario generator. Tools utilized included PowerBuilder 6.5/PFC, Sybase ASE and ERWin.
- Developed the backend Oracle database used in the initial rollout of the iShares.com web site and later assisted in migrating the database to Sybase ASE.
- Performed implementation, extensive customization, database integrations and ongoing support for WorldTrak CRM at a global financial services firm. Tools utilized included WorldTrak, MS Outlook forms & scripts, Sybase ASE, MS SQL Server, Crystal Reports.
- Enhanced financial services tool used for handling the definition and approval process of new investment fund products. Tools utilized included PowerBuilder 6.5/PFC and Sybase ASE.
- Conversion of Apple Macintosh based advertising contract management system to Intel PC. Tools utilized included ACIUS 4th Dimension.

Barclays Global Investors, San Francisco, CA

9/07 to 4/08

Principal – Design & Development Manager: Barclays Global Investors (BGI) is one of the largest institutional investment managers with \$2 trillion in assets under management. As the Design & Development Manager in the Client Technology department, I was the global CRM technical lead responsible for managing the support and development activities encompassing the various CRM tool capabilities at BGI. This incorporated a global implementation of SalesLogix utilizing SalesLogix Architect, Administrator, Sync Server and Remote Office Server, an Americas implementation of a custom built pipeline reporting tool, the oversight of the Talisma e-mail handling system, a custom developed CRM tool used by the institutional business and a variety of integrations with internal and external databases.

Accomplishments & Accountabilities

- Managed globally distributed full-time and contingent development staff from hiring, mentoring, goal setting to workload and delivery schedules.
- Managed all aspects of CRM tools development and support.
- Responsible for overall CRM design and code review.
- Responsible for vetting business requirements and technical designs with the business users, developers and impacted departments.
- Responsible for ensuring our nearly 800 SalesLogix users had un-impeded, reliable access to the application by actively monitoring system components and ensuring quality deployments.
- Performed an integral role on a large project, run on a very short time frame, to in source our east coast Call Center.
- Participated in a CRM Strategic Project review with an outside consulting firm.
- Was a member of the BGI architecture design committee.
- Assisted with issue resolution and ongoing knowledge sharing.
- Developed a CRM IT portal and robust documentation.

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Software Solution Specialists, Castro Valley, CA

4/90 to 4/99

Owner: Software Solution Specialists was a custom software development company specializing in the use of PowerBuilder 6.5, Sybase ASE, Oracle 8, Embarcadero ERWin, Sybase PowerDesigner and ACIUS 4th Dimension (4D). The company was incorporated as JVHM, Inc. in 1999. Clients included Pacific Gas & Electric, Cisco Systems, Barclays Global Investors, International Data Group (IDG), Applied Biosystems, Laboratory Systems Services, COR Therapeutics, American Medical Forensic Specialists, Compression Labs, M Squared, PSI and Applied Bar Code Systems. Other companies that used software developed by Software Solution Specialists included Apple Computer, SuperMac, SCI, Tech America, Tonegen America, JBL and Perimeter Industries.

Accomplishments

- Created detailed database designs utilizing ERWin and Sybase PowerDesigner
- Developed, programmed and installed:
 - a competitive sales reporting tool utilizing PowerBuilder and Oracle
 - a sales planning system using a 4D client and a Sybase database
 - a sales reporting and advertising contract management system utilizing 4D
 - a client Assets Under Management admin and government reporting system using 4D
 - a professional personnel placement system utilizing 4D
 - a management reporting system utilizing 4D
 - bar code systems utilizing 4D
 - a sales quotation system utilizing 4D
 - a purchasing & inventory control system utilizing 4D
- Developed, programmed and marketed a CRM system developed in 4D
- Provided Macintosh help desk support

Applied Biosystems, Inc., Foster City, CA

7/84 to 5/90

Sales Analyst: responsible for sales planning, analysis and project leadership support for the U.S. Operations group in the areas of revenue, orders, budgets, commission programs and systems projects. Purchased all Macintoshes for U.S. Operations, set-up new Macintoshes, aided users with miscellaneous questions (hardware & software), secured all Macintoshes and related equipment and maintained a virus protection program. Developed and programmed user applications on Apple Macintosh computers. Programmed management reports utilizing Cognos Powerhouse applications on HP3000 running ASK software. Tooled complex, macro driven MS Excel spreadsheets.

Accomplishments

- Responsible for development and monitoring of the Fiscal Sales Plans for U.S. Operations
- Created / supported a management reporting system for bookings and employee tracking
- Created and maintained an order forecasting system for the outside sales force
- Set-up and maintained Macintosh network including file/print servers and backup systems
- Set-up an E-Mail system
- Researched and recommended Customer Service and Order Processing systems

Customer Service Manager: supervised and directed customer service and data entry functions; maintained an excellent working atmosphere; built strong relationships with other departments and field representatives; maintained the computer system as it applied to customer service; reviewed, negotiated and implemented a telephony system to help monitor and improve the level of service; developed and documented customer service procedures and systems; established customer service policies; reported reagent dollar bookings; planned and budgeted for the growth of customer service; made sure that the level of service provided exceeded company standards.

Accomplishments

- Grew the customer service department from a two person group to a seven person group handling in excess of \$70,000 per day in consumable orders and \$200,000 per day in instrumentation orders
- Aided in the development of an order processing UI and call distribution/statistics system

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- Gained extensive knowledge of ASK OMAR and Cognos' PowerHouse QUIZ software
- Played a major role in the conversion and implementation of OMAR at two off-site divisions
- Implemented many Customer Service Policies
- Authored the Customer Service Procedures Handbook

other experiences

Bookkeeper, G/L, Fixed Assets, Payroll, A/P, Retail & Outside Sales, Data Entry, Photographer, Assembly/Packaging, former Real Estate licensee, Eagle Scout, Private Pilot, Scoutmaster

SalesLogix Architect, Administrator, Sync Server and Remote Office Server, Salesforce, BusinessObjects, Python, SVN, WorldTrak, WordPress, PHP, MySQL, Zendesk, SVN, Jira, Toggl, Asana, BaseCamp, VBScript, MS SQL Server, Sybase ASE, EnterpriseWizard, Visual Analyzer, Crystal Reports, MS Task Scheduler, Chilkat FTP, ASP, HTML, CSS, MS IIS, Visual Basic, PowerBuilder, ERWin, Sybase PowerDesigner, Adobe Photoshop, Adobe Illustrator, Adobe Dreamweaver, Adobe Lightroom, PageMaker, 4th Dimension, ASK OMAR, Basic, Cognos Powerhouse QUIZ, Cobol, MS Windows, Apple Macintosh, Fargo Barcode Printers...

education

California State University, Hayward, CA

3.7 GPA

B.S. Business Administration: Graduated Cum Laude; Dean's List, Small Business Administration Award

California Polytechnic State University, San Luis Obispo, CA

3.6 GPA

Ornamental Horticulture: President's Honor List, Dean's List, Scholarship Recipient

San Mateo High School, San Mateo, CA

College Preparatory Studies