

Jeff Lambert

Castro Valley, California
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Objective To put my years of varied software development, data wrangling and management skills to play for an employee oriented firm with a fun environment that also engages in community and philanthropic activities.

Summary Over my career I have worked for and with large and small businesses across a variety of industries in roles with varying levels of responsibility and have performed a wide range of functions including software development, data integration, project management, pre-sales support, customer service, desktop support, manufacturing assembly, accounting, photography and real estate sales. My technical skills include several programming languages and classic and big database design and development tools.

Experience **BlackRock**, San Francisco, CA – Vice President July 2013 to present

Blackrock is the largest Asset Manager in the world, managing in excess of \$6.3 trillion dollars in assets and employing 13,000 employees in more than 30 countries.

Data Acquisition Design & Development Manager: Within Digital Wealth I am globally 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 vertical applications, data scientists and canned and ad hoc reporting. My direct reports are located on both coasts of the US and in Singapore with wider data team members located in Hungary, England and India. While growing this role I authored a Python application used to handle all acquisition pipeline processes, transformations and downstream integrations that also utilize Pig and Spark scripts and file monitoring systems. My role involves collaboration with many internal groups and external vendors at all levels.

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 included consumption and transformation of CRM and financial sales and asset data into a HortonWorks Hadoop infrastructure. The initial end product included profile reporting as well as sales opportunity identification and deeper sales reporting. The accomplished strategic goal was to remove the data silos that existed 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. The system supported 300+ wholesalers including territory management and transfer agent data processing and integrations. Additional duties included new requirements gathering, documentation and implementation.

JVHM, Inc., Castro Valley, CA – Founder / President April 1999 to present

JVHM, Inc. is a software development and consulting firm specializing in software and data development projects including CRM systems, custom client/server applications, database design and development, application migrations and integrations and website design and development.

Project Sampling:

- Globally implemented, customized, upgraded and supported SalesLogix CRM with a large financial services firm. 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 integrated with downstream and upstream systems both internal and external to the client.
- Managed several Salesforce implementations including the implementation 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 and end-user and admin training.
- Extensive experience engaging with clients to design and develop over 35, industry standard web sites.
- Designed and developed database and system integrations to support a custom web based pipeline reporting tool for a large financial services firm.
- Designed and developed the database and GUI for a sales management system that supported the institutional sales organization within a financial services firm. This tool included detailed client information retrieval, an advanced query tool and a holdings scenario generator.
- Developed the backend Oracle database used in the initial rollout of the iShares.com web site and later assisted in migrating the database to the core Sybase ASE database.

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Experience (cont'd)

Barclays Global Investors, San Francisco, CA – Principal

September 2007 to April 2008

Barclays Global Investors (BGI) was one of the largest institutional investment managers with \$2 trillion in assets under management. BGI was a pioneer in Exchange Traded Funds (ETFs) with the iShares brand still dominating market share today under the ownership of BlackRock.

Design & Development Manager: As the Design & Development Manager in the Client Technology department, I was the global CRM technical manager responsible for the support and development activities encompassing the various CRM tool capabilities at BGI. This incorporated a global implementation of SalesLogix, 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 systems.

Accomplishments & Accountabilities:

- o Managed globally distributed full-time and contingent development staff.
- o Managed all aspects of CRM tools design, development, implementation and support.
- o Responsible for vetting business requirements and technical designs with business users and developers.
- o Responsible for ensuring nearly 800 SalesLogix users had un-impeded, reliable access to various systems.
- o Performed an integral role on a large project, run on a very short time frame, to in source our Call Center.
- o Was a member of the BGI architecture design committee.
- o Developed a CRM IT portal and robust documentation.

Software Solution Specialists, Castro Valley, CA – Founding Owner

April 1990 to April 1999

Software Solution Specialists engaged in a range of custom application development projects.

Project Sampling:

- o Created detailed database designs utilizing ERWin and Sybase PowerDesigner.
- o 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
 - an Assets Under Management admin and government reporting system
 - a professional personnel placement system
 - bar code systems
 - a purchasing & inventory control system
- o Developed, programmed and marketed a Macintosh based CRM product.

Education **California State University, Hayward, CA**

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

California Polytechnic State University, San Luis Obispo, CA

Ornamental Horticulture; President's Honor List; Dean's List; Scholarship Recipient

San Mateo High School, San Mateo, CA

College Preparatory Studies

Skills Tech: Python, Hadoop, Hive, HDFS, Pig, Spark, PHP, MySQL, MS SQL Server, Sybase ASE, SalesPage, Salesforce, SalesLogix, BusinessObjects, Jira, SVN, HTML, CSS, WorldTrak, WordPress, Zendesk, Toggl, Asana, BaseCamp, VBScript, Visual Analyzer, Crystal Reports, MS Task Scheduler, FTP, ASP, MS IIS, MS SSIS, Visual Basic, PowerBuilder, ERWin, PowerDesigner, Adobe Photoshop/Illustrator/Dreamweaver/Lightroom, PageMaker, 4th Dimension, EnterpriseWizard, ASK OMAR, Basic, Cognos Powerhouse QUIZ, COBOL, Linux, MS Windows, Apple Macintosh, Barcode Printer serial communications....

Other: Software Development and Management, Customer Service Manager, Sales Analyst, Bookkeeper, G/L, Fixed Assets, Payroll, A/P, Retail & Outside Sales, Data Entry, Photographer, Assembly/Packaging, former Real Estate licensee, Eagle Scout, Scoutmaster, Private Pilot