Adam Vero – Microsoft Dynamics CRM Consultant and Trainer

Personal Details

Email:	**adam.vero@MeteorIT.co.uk**	Driving licence:	Since 1994
Telephone:	**0113 248 7125 / 07968 639 143**	Address:	3 Montagu Place, Leeds, LS8 2RQ

Background Information

I have been running an independent IT training and consultancy firm for eight years, helping clients to make better use of technology and software in their businesses to improve efficiency, develop internal processes, enable better decision making, manage collaboration and become more agile.

For twelve years prior to that I held various positions in **IT management, systems administration**, service delivery, programming and teaching. My experience in these roles includes **major rollout and integration projects** for blue chip companies and **IT management for a large legal practice**.

My expertise is in designing and configuring computer systems and processes to help companies get the maximum business benefit out of their investments in software and technology in general. My focus is primarily on Microsoft software and particularly **Dynamics CRM**, which I have been working with for over five years and I hold several technical certifications in this area (detailed below).

As a **Microsoft Certified Trainer** and **Microsoft Office Master Instructor** I deliver various Microsoft Official Courseware "MOC") courses in Dynamics CRM 4.0, 2011 and 2013 as well as my own bespoke training courses for Windows 7 and Microsoft Office 2003 through to 2010 at advanced levels. I have also been involved in authoring official Microsoft courses and exams for Dynamics CRM 2013.

I write about CRM and related IT topics at blog.crmguru.co.uk, and I am a regular speaker at CRM User Group meetings in the UK and abroad. In 2011 I was granted the "Microsoft Community Contributor" award for my participation helping others in online forums.

Education and qualifications

Microsoft Certified Trainer – MCT ID: 3480870

Microsoft Certified Business Management Solutions Specialist / Technology Specialist

Microsoft Dynamics CRM 2013 Deployment (MB2-702)

Microsoft Dynamics CRM 2013 Customisation and Configuration (MB2-703)

Microsoft Dynamics CRM 2011 Customisation and Configuration (MB2-866)

Microsoft Dynamics CRM 2011 Installation and Deployment (MB2-867)

Microsoft Dynamics CRM 2011 Applications (MB2-868)

Microsoft Dynamics CRM 4.0 Customisation and Configuration (MB2-631)

Microsoft Dynamics CRM 4.0 Applications (MB2-632)

MCSA:Messaging - Microsoft Certified System Administrator (MCP since 2005)

Managing and Maintaining Microsoft Windows Server 2003 (70-290)

Implementing, Managing, Maintaining Server 2003 Network Infrastructure (70-291)

Planning, Implementing, Maintaining Server 2003 Active Directory (70-294)

Installing, Configuring, and Administering Microsoft Windows XP (70-270)

Implementing and Managing Microsoft Exchange Server 2003 (70-284)

Designing Security for Windows Server 2003 Networks (70-298)

Microsoft Office Specialist: Master Instructor (2003, 2007)

Excel 2010

Excel 2007, Word 2007, PowerPoint 2007, Outlook 2007 and Windows Vista for the Business Worker

Excel 2003 Expert, Word 2003 Expert, PowerPoint 2003, Outlook 2003

Software experience (major items only)

Microsoft desktop and server operating systems from DOS 5, Windows 3.1 through 95, 98, NT4, 2000, XP, 2003 to Windows 7 and Server 2012. Dynamics CRM 4.0, 2011, 2013. MS Exchange 2000, 2003, some 2010. MS SQL 7, 2000, some 2005, 2008. Office 95 (and older) to 2010 (Outlook, Word, Excel, PowerPoint). Lotus Notes v4 to 7.

Recent Career History

Meteor IT Ltd: Managing Director, Consultant and Trainer (since June 2005)

I advise companies how they can make better use of IT to achieve their business goals, concentrating on making the most out of software they already have or are planning to implement. I work with organisations as an additional resource to complement existing staff, to provide expertise they need or to bring an independent viewpoint. **I provide consulting and training services to my own clients as well as on a freelance basis for other IT services companies**, and I bring my practical skills learned from consulting work into the classroom when teaching.

Over the last five years I have **specialised in Microsoft Dynamics CRM 4.0, 2011 and 2013**, helping businesses to design and customise systems to match their business processes and working practices. I have worked on completely new implementations of CRM on-premises and CRM Online, including data migrations from previous systems. I have also performed several upgrade migrations from CRM 4.0 to 2011.

I always make sure that the proposed solution design is easy for staff to use to ensure high levels of user adoption, while giving management the right levels of visibility and reporting capability to properly understand and control their business. My pragmatic approach always remains **focused on delivering a return on investment** in any system, and especially one as central to a business as CRM.

- Full cycle implementation of Dynamics CRM 4.0 and 2011: Business Analysis, solution design, installation, customisation and end-user training.

- Writing Workflows and on-form JavaScript for CRM to automate and regulate business processes

- Creating management reports and dashboards in CRM; using Excel for data analysis eg PivotTables

- Process re-engineering to improve efficiency and provide better business management

- Teaching Microsoft Official Courseware (MOC) courses in CRM 4.0 and 2011, particularly 8912, 80003, 80294, 80296 and others

- Bespoke teaching CRM 4.0 / 2011 to end users, system customisers and administrators

- Training programme design and teaching advanced level MS Office 2003/2007/2010

- Designing Excel spreadsheet models for financial management, forecasting and reports

Read Hind Stewart / Cobbetts: Infrastructure Manager (November 2000 - January 2005)

I joined Read Hind Stewart solicitors as a technician and was promoted a few months later to IT Services Manager. In this role I was responsible for all IT systems for the 100 or so people in the firm including:

- Managing IT budget for hardware, software and support; recruiting IT staff and contractors

- End-user software training and support

- Developing Crystal reports for financial and management accounting and KPIs

- Creating and updating company intranet

The firm merged with Cobbetts 18 months later, and I took on the role of Infrastructure Manager, mainly dealing with technical architecture and large projects. I managed the subsequent IT integration with a firm in Birmingham, as well as other smaller mergers taking the firm to around 800 staff across three sites.

These projects involved consolidation of infrastructure, business practices and policies, and importing documents and data into centralised systems. I also provided third line support to the technical team in areas where I was still the subject matter expert such as AD and Group Policy. The specific areas I managed were:

- Active Directory design and documentation

- Writing logon scripts and Group Policies

- Email filtering and antivirus software

- Document and email migration (for 5 mergers)

- Standardising desktop builds to reduce TCO

- Software license auditing and management

- Developing a revised Computer Use Policy

- Managing office moves and re-organisations

I left Cobbetts to spend a few months travelling in the southern hemisphere before setting up Meteor IT.

Specialist Computer Centres: Technical Account Manager (January 1996 - November 2000)

At SCC I provided consultancy and service delivery for accounts from the UK's top five banking and insurance firms. I delivered proposals for major projects to senior management and technical personnel. To ensure SCC met agreed targets I acted as facilitator between the customer, our internal resources and external suppliers. I also managed on-site sales and service support teams working with clients in their own offices.

- Managed IT procurement process through to "delivery to desk" for a leading UK bank

- Automated monthly KPI report process, reducing time to produce from four days to four hours

- Managed major server installation project for an online investment banking joint venture

- Co-ordinated rollout of >£1 Million of PC hardware and software for Y2K project

Dynamics CRM Projects (most recent first)

Lead Author, Course 80542 "Customization and Configuration in Microsoft Dynamics CRM 2013"

As lead author of this three-day instructor-led course I was responsible for writing about half of the modules, as well as technical review of all modules and labs, writing additional content for modules and creating all supporting materials such as PowerPoint slide deck and instructor notes. I also recorded the e-learning version of the course.

Dynamics CRM 2011 On-Premises Implementation and data migration from Act

A client specialising in software for the education and training sector wanted to replace Symantec Act and a bespoke in-house quotation system with Dynamics CRM 2011 as their single business process management tool. As lead consultant I worked with the client to analyse their existing and desired business processes, wrote the system specifications and installed and configured the system to meet these requirements.

This implementation made extensive use of the CRM product catalogue and sales processes as well as substantial customisation, creation of some complex workflow processes, and some bespoke development to provide better automation for their annual customer renewals process. I managed the migration of their existing "flat" Account and Contact data into a hierarchical model suited to Dynamics CRM. I also cleansed the data to improve accuracy and formatting, and created new Contact records from implicit data such as additional email addresses.

Dynamics CRM 4.0 to 2011 Migration and System Review

I was the lead consultant upgrading a specialist software company's CRM 4.0 system to CRM 2011 for about 115 users. To take advantage of newer features I also worked with them to perform a full review of the system and improve many areas of form and view layouts, on-form javascripts and complex workflows.

Dynamics CRM Online – Implementation and data migration from Goldmine

A small consulting services organisation wanted to implement CRM Online to improve their process management and provide clearer management reporting across the business. I worked with them to design, build and customise a system to fit their requirements and train their diverse group of users to use this. There was substantial customisation around project management and time recording, as well as areas for grant applications and funding, event management and a customer 'membership' programme.

Dynamics CRM 2011 Upgrade and integration using the Connector for NAV

I completed an upgrade from CRM 4.0 to 2011 (alongside a consultant upgrading to NAV 2009) and installed and configured the Connector to integrate the two systems, bringing Account, Contact, Sales Order and Invoice data from NAV into CRM. I added custom fields in CRM and redesigned most of the forms, views and reports in CRM to suit the customer, and trained the staff to use the upgraded and improved system.

Dynamics CRM 4 internal project for MS Gold Partner – training, support, customisation

A MS Gold Partner rolled out Office 2007 and replaced Goldmine with CRM 4.0. I started by training staff how to use this new software to manage their work. I continued to customise CRM system to fit their evolving needs, wrote complex workflows to automate processes, and created reports to provide better data analysis. I also coordinated internal developers to produce bespoke plugins, workflows and integration components.

Other Projects

Bespoke Training programmes in Microsoft Windows 7, Outlook 2010, Excel 2007 and 2010

I wrote and delivered a series of 12 "Masterclasses" in Excel 2007 for a FMCG client. 64 people attended an average of 2.6 classes each between beginner and expert level. I also developed a broader training programme for them, writing materials for Lotus Notes, Word, Excel and PowerPoint. When the client rolled out Windows 7 and replaced Lotus Notes with Exchange/Outlook 2010, I delivered bespoke courses to 150 staff across sites in the UK and Ireland. I also helped administrators configure settings to ensure staff received the best user experience.

Company acquisition - systems integration, data migration and training

A FMCG client acquired another company and I helped them integrate this in their existing business. After setting up new servers, I moved all documents and email data to the new systems in a single day after the year end. I trained users in their new applications, company practices and their Computer Use Policy. During a previous company acquisition by the same client, I took on interim management of the company's old systems and office move. I migrated accounting data, documents and email (Exchange to Lotus Notes).

Document Management System (DMS) migration

I carried out the move of 700,000 files into a document management system for a company merger. I trained staff to use a bespoke application (written to my specification) to categorise files and developed scripts to process remaining documents. Sensitive documents were secured throughout against unauthorised access.

Outsourced IT procurement team

I set up, recruited and managed a procurement team for a major UK bank managing IT requests through to installations. I built reports to measure KPIs and show performance improvement against specific targets.