

GEOFF FALK

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OBJECTIVE

To secure a challenging Architect/Developer position where I can utilize my excellent technical and problem-solving skills to get things done efficiently, with all of the details right the first time

“...Love your **‘can do’ attitude.**”

—Gordon Ross, VP Online Division, Advantex

“It is always a pleasure working with you.”

—Godfrey Branch, Sr. IT Manager, IAVI

“We really are incredibly grateful to have you on board.”

—Colleen Boyne, Development Associate (SalesLogix Admin), IAVI

“Geoff Falk has demonstrated **exceptional problem solving skills** and **taken initiative** to create **cost saving benefits** for the organization with exceptional finesse, optimism and enthusiasm.”

—Seasonal High Five Award 2001 (Advantex)

SUMMARY OF QUALIFICATIONS

- Ten years architecting and customizing SalesLogix CRM, on versions 6.0 through 8.0 LAN, and 7.5 through 8.0 Web
- Four years architecting and customizing Microsoft Dynamics CRM, beginning with version 4.0 in 2010
- Microsoft Certified Technology Specialist (MCTS) certification on MS CRM 2011 exams. Certified as SalesLogix LAN and Web Developer
- Full Software Development Life Cycle (SDLC) from initial requirements-gathering on client site with sales and business-analysis teams, through architecture, and business/technical document creation, and then to building, deployment, and long-term maintenance of the system
- Have done extensive customizations for the business world in VBA behind Excel, PowerPoint and MS Word
- Created web apps in HTML5, jQuery Mobile, and JSON; and websites in HTML, JavaScript, PHP, ASP and ASP.NET
- Extremely proactive, with excellent communication skills

TECHNICAL SKILLS

C#	MS CRM	jQuery Mobile	SQL Server	SharePoint
ASP.NET	SalesLogix	HTML5	Oracle	SSRS
ASP	XML	JSON	ODBC	OLAP
COM	CSS	JavaScript	PHP	MDX

IT CERTIFICATIONS & TRAINING

- Microsoft Certified Technology Specialist (**MCTS**), via Qixas **Microsoft Dynamics CRM 2011** Accelerated Boot Camp (2012), exams MB2-866 and MB2-868

- Certified Sage SalesLogix **Web Developer** (SLXWEBD75) with Advanced Web Dev (2010)
- Completed **SalesLogix** Certified Systems Administrator (SLXSA) and Customization Training (2002)
- **e-Commerce Solutions Developer diploma** from The Institute for Computer Studies (2001), 96% overall average

PROFESSIONAL EXPERIENCE

GDF SOLUTIONS (self-employed), Toronto, Ontario
CRM Consultant Architect/Developer, June, 2003 to present

- Worked in a team to upgrade the heavily customized **SalesLogix Web** installation from 7.5.2 to 8.0, for a major retailer of luxury menswear
- As a Systems Architect, I have gathered and documented project requirements (in **BRD** and **TRD** docs), translated client business models into the CRM object model, and determined which additional custom entities would be required for the CRM to implement that model

From that architectural work, I performed form and scripting customizations, and entity creation, for the following projects:

- A \$250K **SalesLogix LAN** system for a **wealth-management** company in Colorado, with customizations to track client portfolios, purchases and liquidations, and net holdings (which were calculated from the first-in, first-out P&L). The net holdings for each client product also included calculations for % Gain/Loss and Annual Rate, while the calculations for the current market value utilized a daily-updated list of precious-metals prices
- A \$330K **SalesLogix LAN** system for a marketing company in Toronto, featuring custom integration with courier **web services** (Purolator), DocuSign, Google Maps, third-party (DevExpress) controls, and a mobile-compatible **ASP.NET** web portal for users/employees without CRM licenses
- A \$450K **SalesLogix LAN** system for an American company re-selling radio-station advertising time, with customizations to track Station (Account) data, including available and filled ad time slots for each station, and customizations for the tracking of employee data, including for the input of days/time worked
- A \$275K **MS CRM 2011** system for a Florida health-industry company, with customizations to track their unit sales and inventory via integration with their existing web app databases, use of the **Service Calendar** for tracking their conference and training events, plus H.R. tracking for employee and new hire data, and their Sunshine Act needs
- A \$70K **MS CRM 2011** system for a tree-planting company in BC, with a custom **C#** integration to push Order and Contract data from their back-end systems into MS CRM
- A \$20K **MS CRM 2011** system for an aerospace company headquartered in Ottawa, with **JavaScript** to query Product entity data via **OData**

In addition to those projects I maintain the **MS CRM 2013 Online (Office 365)** implementation for a global non-profit organization headquartered in NYC, providing them with customizations and consultation advice. I have maintained and enhanced their CRM system since 2005, when they were using **SalesLogix**. For that SLX system, I created a web service in **C#** to call parameterized stored procedures from a staging-area **SQL Server** database (which in turn reads from **SalesLogix**), and unpack the **XML** returned from the stored procs into User, Donation and Publication objects for a third-party **SharePoint** front end. From early 2008 to late 2009, I was also the webmaster and developer for their public-facing website. In that time I created many additional pages for that site, hand-coded in ASP and **JavaScript**, to display data from their CRM

- Posted my [SalesLogix](#) development tips and tricks for the benefit of the SLX community at www.geofflogix.com
- On my [own initiative](#), created an integration in [C#](#) between SalesLogix and [SharePoint Online 2010/2013](#), utilizing the SharePoint Client Object Model ([CSOM](#)) to programmatically connect to SharePoint and obtain the available Libraries and the contents of Lists, providing SLX with much of the functionality seen in the List Component for MS CRM 2011
- Utilizing the [MS CRM SDK](#) I have built integrations in [C#](#) (with [LINQ](#)), connecting on the back-end to ERP/legacy databases and on the front end to the MS CRM [RESTful](#) web service, to push data periodically from those back-end databases into both out-of-the-box and customized MS CRM entities
- In [MS CRM 2011](#), utilized [JavaScript](#) to dynamically show/hide and expand/collapse tabs, refresh grids, implement dependent option sets, and create/update records through [OData](#) and [FetchXML](#)
- Edited the MS CRM 2011 navigation bar [XML](#) to remove unneeded OOTB features that could not be restricted via Security Roles, and created simplified versions of the CRM Account, Contact, and Opportunity forms, released to CRM users with the Salesperson Role, via [Role Based Security](#)
- Created expert-level [SSRS](#) reports with multi-valued parameters, utilizing [T-SQL stored procedures and user-defined functions](#) to enable the procedural data manipulation required for the reports to be done on the server. Most recently, I have customized reports created by clients in the MS CRM Report Wizard, to allow them to export SUM-able numbers to Excel instead of formatted strings
- Created [KnowledgeSync](#) alerts, and [Crystal XI](#) reports, against SalesLogix databases
- In order to capture Sales Leads sent from web pages to an email inbox, I created a [C#](#) app to download emails from [MS Exchange](#) via [Exchange Web Services](#), parse the text, implement business rules, and write the data to a [SalesLogix](#) database
- Built [SSIS](#) packages in [SQL Server 2008](#), with [C#](#) scripting, to monitor databases for record additions and field value changes, with logging of errors to the Windows Event log
- Built [ASP.NET](#) web pages for web portals, utilizing Master Pages for site styling, to offer read/write access to the [RESTful](#) web service exposed by the CRM (e.g., SalesLogix, which uses SData for its RESTful access, which is simply the Sage-branded version of the [OData](#) utilized by MS CRM)
- Created a [CRM Dashboard](#) to display new Contacts entered into the system, with options to show only records created in the past 30 days, 31 to 60 days ago, or 61 to 90 days. The dashboard also included a grid to display all Questionnaires emailed out to new Contacts, with a field for whether the client had responded to the questions. The records in that Questionnaire grid, and the field for Responded, were obtained by searching the database for History records with a Notes field that contained the questions sent out; if the client had interspersed those questions with responses, the questions would no longer be contiguous in the email text
- For on-premise SalesLogix CRM deployments, where the option exists to connect directly to the SQL Server database, I have executed CRUD operations via [ADO.NET](#) through the SLX [OLEDB Provider](#), to push data into SLX from text files, for integration with back-end (e.g., accounting) systems
- Created a mobile nutrition-tracking web app with a back-end [RESTful](#) web service in [PHP](#) and [MySQL](#), and the front end in [HTML5](#) and [jQuery Mobile](#)
- I have installed, customized, and migrated data into [SugarCRM](#), with [SQL Reporting Services](#)
- Formulated detailed test plans for the [KnowledgeSync](#) alerts deployed to clients
- Prepared end-user [training guides](#), which were customized to reflect the architecture of the CRM system being deployed; and led one-on-one training sessions for end users. I have

also conducted developer training sessions for clients; and guided junior team members in the performance of their assigned tasks (esp. in the creation of simple customizations and reports for SLX)

- On a contract with the [Ontario provincial government](#) in 2009, I documented their existing Ontario Works ([ASP](#), [JavaScript](#)) infrastructure. The hiring process for that contract included writing a test to verify the candidate's knowledge of ASP, [VBScript](#) and JavaScript; only the top scorers on that test, including myself, were hired

PLASTISOFT CORPORATION, Toronto, Ontario
Software Developer, March, 2006 to February, 2007

- Maintained and enhanced the flagship Tori-Flex software, for this [Microsoft Certified partner](#). For that same enterprise application, I worked with SQL Server 2005 and [SSRS](#), writing [T-SQL](#) code to dynamically generate report queries, and implementing [VB.NET](#) procedures within the reports themselves

ADVANTEX MARKETING INTERNATIONAL, INC., Toronto, Ontario
Software Developer, November, 2000 to June, 2003

- Began with a 6-month contract on the Sales side of the business, sitting with their Sales and Marketing people, and working directly with them to create improvements and (VBA) automations in their workflow. Later, in their I.T. Department, I created an [OLAP](#) reporting application in [ASP](#) and [JavaScript](#), utilizing a custom [COM](#) engine (written in [Visual Basic](#)), thus providing for flexible and timely internal reporting off of our [New York Times](#) and [CIBC](#) data cubes
- Created customizations for [SalesLogix 6.0](#), for the company's online and offline (Samplex) divisions, implementing their loyalty-marketing business models with a view toward expandability to future loyalty programs
- Built separate data cubes (with staging areas and fact tables created via [T-SQL](#)) for our [CIBC](#), [United Airlines](#), and [US Airways](#) reporting
- On my [own initiative](#), designed, programmed and tested automations (up to 10,000 lines of code) for the preparation of Excel and PowerPoint business presentations and reports in [Visual Basic](#)/VBA and dynamically-generated [HTML](#), utilizing [SQL](#) calls to an [Oracle](#) database, saving this [TSX](#) company over [\\$10,000](#) annually in labor costs
- Conceived and implemented a seamless automated [Visual Basic](#) solution allowing our Sales Department to run reports including "manual" merchant transactions, which were not present in the [Oracle](#) database. The entire IT and IS Departments at Advantex had previously concluded that the problem was *unsolvable*; it took me less than five minutes to conceive of a simple and workable solution, and a mere fifteen hours to implement it
- Documented the existing [Oracle PL/SQL](#) code used to process [CIBC](#) Visa Bonus Aeroplan Miles transactions
- Copyedited and quality-assured websites for [US Airways](#) and [CIBC](#), logging over 100 variances in style and functionality for the US Airways Dividend Miles Online Rewards Mall, ensuring a fully-professional, world-class website. Of the final batch of twenty variances submitted, our regular Quality Assurance professionals had overlooked all but three