

# DAVID STOTT

Partner Delivery Advisor | AI Strategy | Risk Mitigation | Executive Stakeholder Management

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## EXPERIENCE

### Executive Customer Success Manager, FDE

#### Uptima

📅 05/2025 - Present 📍 Remote

- Sr. Customer specialist aligned within the Salesforce Service, Salesforce Sales Cloud, Experience Cloud, Mulesoft Agentic Workforce.
- Key Systems: Service Cloud, Sales Cloud, Experience Cloud, Agentforce, OpenAI, Gemini, Mulesoft, Claude.
- Successfully re-launched customer Agentic Initiative.
- Achieved proper license SKU and Consumption versus License Model.
- Reduced redundant FTE'S BY 65% through API and Mulesoft RPA.
- Managed a successful pilot resulting in 500K revenue increase by overseeing 210 users over 5 topics in 6 weeks.
- Forward Deployed Engineer on AI clients.

### Sr. Engagement and Delivery

#### NeuraFlash

📅 01/2025 - 05/2025 📍 Remote

- Sr Engagement and Delivery specialist aligned within the Salesforce Service, Experience Cloud, Agentic Workforce solutions and AWS AI systems
- Key Systems: Experience Service Cloud Voice, Field Service, Sales Cloud, Experience Cloud, Agentforce
- Red project reclamation specialist, realigned goals, outcomes and success drivers to ensure Salesforce projects are completed successfully. Contributed to a CSAT of 5 on all projects
- Advised on best practices, accelerated Knowledge and workflows and automation to increase productivity by 45%

### Sr. Advisor, Customer Engagement

#### Atherian Consulting

📅 04/2023 - 02/2025 📍 Remote

- Consulted and advised for non-profit and small business start-ups to increase success with Salesforce and related technologies
- Coached the organization in the creation of an advisory board and COE for non-profit to use Salesforce successfully for outreach and missions. Reported an increase in campaign contributions by 65%
- Maximized automation workflows to reduce inefficiencies by 71%
- Leveraged Einstein Next Best Action to reduce AHT by 43%, with an additional increase of 39% call deflection
- Achieved 67% decrease in case resolution time through automation, Einstein Knowledge recommendation and adaptive email templates

### Director, Salesforce Platform

#### Republic Finance

📅 12/2023 - 11/2024 📍 Plano, Texas

- Comprehensive review of existing Salesforce environment, executed the re-architecture of Core Salesforce and Financial Services Cloud to eliminate redundant Omni Studio components and Data Mappers, decreasing technical debt by 47%
- Financial Services Cloud Optimization: standardized processes to reduce processing time by 40%
- Loan Origination Efficiency: streamlined process by re-architecting OmniScript, Data Mappers, and Flex cards, reducing user experience screen times by 53%
- Tracked existing technical debt, delivered strategy which represented an initial reduction by 60%
- Enhanced Data Architecture: improved data management through API integration with MuleSoft, Kafka, and Snowflake, reducing data call times by 56% and minimizing bad data injection points
- Service Cloud Strategy Implementation: automated branch operations leading to 75% 1st call resolution

## SUMMARY

Partner Delivery Advisor professional with over 15 years of experience in customer engagement and product management, expert in Salesforce CRM solutions and AI consulting. Key achievements include a \$500K revenue increase in 6 weeks through managing 210 users for the Agentic Initiative and achieving a 75% first call resolution rate via automated processes. Seeking a Partner Delivery Advisor position at Salesforce, where my customer engagement and strategic advisory skills will support Salesforce's mission of empowering partners through exceptional implementation outcomes and leading AI adoption strategies.

## KEY ACHIEVEMENTS



### Enhanced Project Collaboration

Achieved a 47% improvement in project outcomes by enhancing cross-functional collaboration across multiple teams.



### Process Design Implementation

Increased operational efficiency by 40% through effective process design strategy implementation.



### Cross-Functional Call Resolution

Achieved a 75% first call resolution rate through cross-functional initiatives implemented successfully.

## EDUCATION

### Masters Business Administration

#### Bellevue University

📅 2015 - 2018

## CERTIFICATIONS

### Salesforce Certified Platform Administrator

### Salesforce Certified AI Associate

### Salesforce Certified Sales Foundations

### Salesforce Certified Platform Foundations

### Certified Salesforce AI Specialist

### Salesforce Certified Service Cloud Consultant

### Salesforce Certified Data 360 Consultant

### Salesforce Certified MuleSoft Integration Foundations

### Salesforce FDE

### Claude Code Specialist

### Google AI Professional

### Certified AI & Agility Practitioner

### Certified Scrum Master

### AgentBlazer Legend

## EXPERIENCE

### Salesforce Engagement Manager, Professional Services / Delivery

#### Salesforce

10/2019 - 12/2023 Remote

- Automotive Industry: Facilitated the integration of Sales and Service Cloud with Commerce Cloud for a multinational automotive manufacturer to ensure NHTSA compliance of 100%.
- Oil & Gas Industry: Implemented a Loyalty Management system with Experience and Service Cloud, enhancing customer engagement and increasing NPS scores by 35%.
- Manufacturing Industry: Automated Manufacturing Cloud, automating 85% of manual processes and reducing redundant FTEs by 45%.
- Commerce Sector: Modernized key business processes within Commerce and Service Cloud, resulting in a 20% market share increase and a 26% year-over-year improvement in NPS scores.
- Travel & Leisure: Guided a travel and resort company through COVID-related challenges by realigning Sales and Service models, leading to minimal customer attrition and improved employee retention by 85%.

### Director of CRM Strategy

#### Ameritas Financial

08/2018 - 09/2019 Lincoln, NE

- Salesforce Consolidation: Developed and executed a strategic roadmap to unify six Salesforce orgs into a single platform
- This consolidation reduced operational costs and increased cross-selling revenue by 25% within the first year
- Launched Omni channel Service, reducing Average Handle Time by 60%, First Call Deflection increased by 85%
- A/B Tested Campaigns and Marketing engagement, formulating a strategy that resulted in 35% in responses

### Director PMO, Certified Scrum Master

#### Bellevue University

07/2013 - 07/2018 Bellevue, United States

- Led the end-to-end Connected Campus solution, the first university to complete this in Salesforce Higher Ed.
- Directed a team of 100 employees and 4 consulting partners to launch a fully connected campus within 14 months using Salesforce Sales, Service, Analytics, Portal, and Marketing Cloud.
- Achieved a 38% increase in enrollment in the first year and an 89% year-over-year increase in the second year, driving significant growth for the university.

### Founder, Managing Partner, CIO

#### Medigrafix

03/1996 - 01/2014 Omaha, United States

- Managed the development of a proprietary CRM system to support Healthcare Staffing agency which led to a profitable division after 12 months with 50 million annual revenue in the first year with double-digit growth year after year.
- Serviced Electronic Health Record system over 1 million patients annually.
- Achieved 97% customer retention rates consistently and double-digit year-over-year growth.

## CERTIFICATIONS

Safe 6.0 PO/PM

Salesforce Triple Star Ranger

Salesforce Financial Services Super Badge

Super badge: Agentforce Service

Salesforce Prompt Builder Super Badge

## SKILLS

Agentforce

Salesforce CRM

Data Cloud 360

Delivery Risk Management

Strategic Advisory

Executive Stakeholder Management

Program Recovery

Professional Services

Salesforce Architecture

AI Strategy

Enterprise Transformation

Responsible AI

Mulesoft

Cross-Functional Leadership

Financial Services

Tableau (CRMA)

Agile Delivery

GTM Strategy

Technical Business Translation