

Overview

■ has more than 35 years of experience in marketing strategy, direct sales, account management and C-level management. He is adept at quickly understanding complex product and service offerings, forging key relationships and establishing essential strategic partnerships. He has significant experience in the Oil & Gas, Not-For-Profit, Manufacturing, Aerospace & Defense, Medical Device, Automotive, Retail, Recreation, Entertainment, Food & Beverage and IT Services industries. He has international business management experience in China and Latin America and is conversational in Mandarin.

As a certified trainer of CRM and e-commerce solutions, he managed sales and marketing of ERP software and e-commerce solutions for 12 western states in the U.S., and has performed software selection with consulting groups serving the Oil & Gas, Medical Device and Aerospace & Defense industries.

At Panorama, he provides oversight on a number of ERP selection and implementation projects, and provides subject matter expertise in the Energy, Oil & Gas and Utilities industries. He has managed numerous ERP Expert Witness cases over the last 5 years.

Some of his past client work includes DIRECTV, AT&T, MnaRAHR Corporation, Baker Hughes, Shell Oil, HSBC, China Construction Bank, Bank of China, China Industrial Bank, IBM, HP and Xerox. He holds his B.A. Arts in Economics with a minor in Accounting from Fairleigh Dickinson University.

Management and Consulting Experience

- Implemented an enterprise-wide ERP distribution system encompassing worldwide consumer shipments for the world's largest computer specialty magazine publisher
- Managed a DEC magazine subscription fulfillment system and operations staff for four computer magazines
- Served as communications liaison, QC auditor and intersystem troubleshooter between the AT&T billing system, the Bank of New York clearing system and the fulfillment organization's ERP distribution and customer service system, which automated the operation of AT&T's Opportunity Calling, the world's largest loyalty program with 40 million participants
- Managed the ERP distribution and financial system as well as customer service operations for AT&T's Long Distance gift certificate program with more \$250 million of gift certificates in circulation at any time
- Managed Latin America sales for a worldwide campaign management software developer, while selecting and working with system integrators in six Latin American countries; primary clients were international banks and insurance companies
- Managed delivery services for the world's largest system integrator of Infor's Visual ERP system, while managing system implementations, upgrades and modifications for more than 600 clients throughout the Midwest U.S.
- Managed e-commerce and ERP system sales for the largest geographic system implementer for Infor's SyteLine (Visual) software throughout 13 Western U.S. states.
- Toured over 300+ prospects and clients running numerous ERP legacy systems throughout the Americas, including applications such as WMS, TMS, CRM, HRM, QC/QA, BI, etc.
- Managed the marketing database for the world's largest satellite TV and internet provider, while providing strategic direction for marketing campaigns and system capability consulting
- Provided consulting/oversight for the establishment of a customer subscription system for a Greenfield Sports Satellite TV magazine with an initial enrollment of more than one million customers

- Implemented a field service, CRM and manufacturing ERP system for an industry leader in Oil & Gas field services in Houston, TX
- Spearheaded a new business catalog list division for world's largest shared catalog list provider requiring the modification of the core database housing of more than 300 million catalog consumers
- Managed a new media projection division of a Cisco Gold Partner in Chicago, IL

Past Expert Witness Engagements Managed

- Pure Romance LLC vs. Gorilla Inc.
- Stan Group (Holdings) Limited vs. Cosmos i-Tech Solutions Limited
- Insight Direct USA, Inc. vs. Gorilla Inc.
- Prairie River Home Care vs. Salo Solutions
- Bridgestone vs. IBM
- MillerCoors vs. HCL
- State of California vs. SAP
- City of Ottawa vs. CSDC Systems
- Grupo Viz v. Oracle Mexico – Retained by Bufete Asali SC
- U.S. Welding v. TECSYS, Inc. – Retained by Marcus Stephen Harris, LLC
- HB Fuller Co. v. Accenture, LLP – Retained by Kelley Drye & Warren LLP
- Siemens Canada, Ltd. v. Sapient Canada, Inc. – Retained by Lenczner Slaght Royce Smith Griffin LLP
- California State Controllers Office v. SAP Public Services, Inc. – Retained by Duane Morris LLP
- Helix Strategies & Roger Ivey v. Transunion Rental Screening Solutions, Inc. – Retained by Bendel Law Group
- Dylam Developments Pty, Ltd. v. NEC IT Solutions Pty, Ltd. – Retained by ClarkeKann Lawyers
- NetOnNet, AB v. Epicor Software – Retained by Setterwalls Advokatbyrå AB Sweden
- Bridgestone Americas, Inc. v. International Business Machines (IBM) – Retained by Kirkland & Ellis LLP