

Adam Vero

Personal Details

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Background Information

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

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 technical expertise is in designing, building and supporting computer systems in order to help companies get more out of their technology investments. My focus is primarily on Microsoft software and particularly **Dynamics CRM 4 and 2011**, and I hold several technical certifications in this area (detailed below).

I also write and deliver bespoke training courses as a **Microsoft Certified Trainer** and **Microsoft Office Master Instructor**, and have recently provided training on Windows 7 and Office 2010.

In 2011 I was given the “Microsoft Community Contributor” award for my participation helping others in online forums. I write about a range of IT topics on my blog and I am a moderator for Security-Forums.com.

Education and qualifications

Microsoft Certified Trainer – MCT ID: 3480870.

Transcript ID: 708545 Access code available on request

Microsoft Certified Business Management Solutions Specialist / Technology Specialist

Microsoft Dynamics CRM 4.0 Applications (MB2-632) – November 2008

Microsoft Dynamics CRM 4.0 Customisation and Configuration (MBS-631) – November 2009

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

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

Managing and Maintaining Microsoft Windows Server 2003 (70-290) – September 2005

Implementing and Managing Microsoft Exchange Server 2003 (70-284) – January 2007

Installing, Configuring, and Administering Microsoft Windows XP (70-270) – May 2007

Designing Security for Windows Server 2003 Networks (70-298) – February 2008

Implementing, Managing, Maintaining Server 2003 Network Infrastructure (70-291) – November 2008

Planning, Implementing, Maintaining Server 2003 Active Directory (70-294) – February 2009

Microsoft Office Specialist: Master Instructor (2003, 2007)

Excel 2010 – August 2010

Excel, Word, PowerPoint, Outlook 2007 and Windows Vista for the Business Worker – August 2008

Excel 2003 Expert, Word 2003 Expert, PowerPoint 2003, Outlook 2003 – January 2007

Other qualifications and courses attended

Certified Wireless Network Administrator (CWNA) – passed November 2004

COMPTIA CTT+ (Certified Technical Trainer) course attended June 2009

5 A-levels (3 at grade 'A'); studied engineering and maths at Loughborough University

Software experience (major items only)

Microsoft operating systems from DOS 5, Windows 3.1 through NT4 to Windows 7 and Server 2008.

Exchange 2000, 2003, some 2010; MS SQL 7, 2000, some 2005, 2008. Lotus Notes v4 to 7; Crystal Reports

Dynamics CRM 4.0, 2011. Office 95 (and older) to 2010 (Outlook, Word, Excel, PowerPoint, OneNote, Visio).

Recent Career History

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

I started my consultancy practice to advise companies how they can make better use of IT to achieve their business goals, particularly 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 three years I have specialised in Microsoft Dynamics CRM 4 and 2011, helping businesses to design and customise systems to match their business processes and working practices. I always make sure that the proposed 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.

- Business Analysis, solution design, implementation and customisation of Dynamics CRM 4 / 2011
- Writing Workflows and on-form JavaScript for CRM to automate and regulate business processes
- Creating management reports and dashboards in CRM or using Excel for data analysis eg PivotTables
- Teaching CRM 4 and 2011 to end users, system customisers and administrators (usually bespoke)
- Process re-engineering to improve efficiency or provide better business management
- Training programme design and teaching advanced level MS Office 2003/2007/2010
- Designing Excel spreadsheet models for financial management, forecasting and reports
- Reviewing policies and procedures to address areas such as compliance or software licensing

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 expenditure to meet the IT budget
- Purchasing hardware, software and support
- End-user software training and support
- Recruiting IT support staff and contractors
- Developing and producing Crystal reports:
 - financial and management accounting
 - credit control, aged debt and WIP
- Creating and updating the 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 a third line of support to the technical teams for areas where I was still the subject matter expert. The specific areas I managed were:

- Active Directory design and documentation
- Email filtering and antivirus software
- Writing logon scripts and Group Policies
- Standardising desktop builds to reduce TCO
- Document and email migration (for 5 mergers)
- Software license auditing and management
- Developing a revised Computer Use Policy
- Infrastructure capacity planning
- Managing office moves and re-organisations
- Planning and supervising LAN cabling work

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 pre-sales consultancy and service delivery for accounts from the UK's top five banking and insurance firms. I delivered proposals for major projects and support services 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 teams working with clients in their own offices.

- Managing rollout of over £1Million of desktop hardware and software for a Year 2000 project
- Reducing time to produce monthly performance (KPI) reports from four days to four hours
- Outsourcing IT procurement process through to "delivery to desk" for a leading UK bank
- Managing installation of servers for a new online investment banking joint venture

Major Projects (most recent first)

Dynamics CRM 2011 Upgrade and integration using the Connector for NAV

I completed an upgrade from CRM 4 to 2011 (alongside another 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, including custom fields in CRM to hold data specific to the business. I redesigned most of the forms, views and reports to suit the customer, and delivered training for the users.

Dynamics CRM 2011 Project – scope and initial business analysis, system design

This recent project was for a proposed implementation of CRM 2011 for a commercial services business with around 100 staff to replace several existing systems, and fill gaps where no software was being used to manage their processes. I met with stakeholders from all areas of the business and produced a detailed scope and draft system design. When the project goes ahead, it will be around 80 man days of implementation and bespoke development work including integration to a mobile platform.

Training programme for Windows 7 and Outlook 2010 rollout

I created bespoke courses for a client rolling out Windows 7 and replacing Lotus Notes with Outlook 2010 (and Exchange 2010). I delivered training to 150 staff in the UK and Ireland, as well as advising system administrators to ensure users received the best possible experience from their new platform. This included using Group Policy to control Outlook settings, making sure AD information was complete, setting up resources and room lists correctly, and indexing file servers to allow users to use “Libraries” in Windows 7.

Training programme – Excel 2007 “Masterclass” bespoke course design and delivery

A long-standing FMCG client needed to provide training in Excel 2007 from beginner to expert levels as part of their staff development programme. I wrote and delivered a bespoke series of 12 “Masterclasses” for 64 users who started at their chosen level and continued through several sessions (some as many as eight).

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

A MS Gold Partner for Dynamics rolled out Office 2007 and replaced their Goldmine system with CRM 4.0. I trained staff how to use this new software to manage their daily work. I continued working on the project to customise the CRM system to fit their evolving needs, wrote complex workflows to automate processes, and created reports to provide management data and analysis. I also coordinated internal developers to produce bespoke plugins, workflows and integration components and ensure these met the business requirements.

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 had to move 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.

Training programme - Training Needs Analysis, bespoke course design and delivery

I created and delivered a bespoke training programme for 45 staff in the UK division of an international food manufacturer. I wrote and provided all learning materials for different skill levels in Lotus Notes, Word, Excel and PowerPoint. Later I provided Office 2007 upgrade training as well in their UK and Ireland offices.

Company acquisition - interim IT management, systems migration and office move

Following a merger, I extended my client's infrastructure to allow staff from both sites to work alongside each other, and took on support for their old systems and home workers. I converted email data from Exchange to Lotus Notes, as well as accounting data and documents, and assisted with the logistics of the office move.

Moving 70 staff to new premises, 30 in existing offices, 20 new arrivals – project management

I managed expansion to a second building, supervising external suppliers and coordinating with internal teams. Two smaller firms were acquired at the same time and their employees, systems and data transferred. 70 new PCs were rolled out, and around 30 other staff moved during the following week as well.

Document Management System – project management, bespoke application, user training

I managed 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 – process definition, team recruitment and management

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.