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## **Solution Architect Performance Profile** (Microsoft SharePoint, Dynamics CRM, Salesforce.com)

### **C5 Insight Overview**

C5 Insight focuses on delivering cloud-based solutions developed on the Microsoft SharePoint, Dynamics CRM, Salesforce.com and .NET platforms. We are a leading provider of document management and search, extended and customer relationship management (xRM / CRM), business intelligence, social collaboration and knowledge management, and intranet and extranet portals. We also offer SharePoint and Microsoft CRM hosting services.

C5 is unique in the level of in-depth resources that we provide. Our consultants have each worked on numerous engagements and know the subtle issues inherent to the solutions that we provide. They hold certifications in Microsoft SharePoint, Salesforce.com, Microsoft CRM, DotNetNuke, .NET development, Scribe, SQL Server and a variety of other best-of-breed technologies. We are also a Microsoft Gold Certified Partner, Salesforce.com Consulting Partner, and Scribe Certified Partner.

### **Position Summary**

The Solution Architect is responsible for delivering successful Microsoft SharePoint, Dynamics CRM and Salesforce.com projects to our clients. Their duties are carried out by working with one or more Business Consultants, Project Managers, or Technical Architects to understand the client's needs and configure the selected system to meet those needs. The Solution Architect documents requirements, installs server and desktop software, configures solutions, executes data migration strategies, works with developers to communicate requirements, plans and implements QA work, and provides training and support to our clients. The Solution Architect will have strong technical knowledge and excellent written and verbal communication skills. Candidates for this position must have hands-on experience configuring at least one of our core supported applications (Dynamics CRM, Salesforce.com or Microsoft SharePoint) and, ideally, with one or more of the following: Scribe, SQL Server Reporting Services (SSRS), JavaScript, .NET development.

Experience in business analysis, end-user training and with one of the above technologies is required. We are hiring for all levels within this position (Associate Solution Architect, Solution Architect and Senior Solution Architect).

### **Organization Structure and Interfaces**

This position reports to the Director of Solutions Architecture. The Solutions Architect will also interface with all others within C5 Insight – the nature of these relationships changes based on the requirements of each individual client engagement. The Solutions Architect is expected to work under the management of a Project Manager or Business Consultant on each project. The Solutions Architect must also be able to work highly independently, providing turnkey services on smaller projects or, in some cases, functioning as a Project Manager on small projects.

### **Performance Objectives**

1. *Demonstrate high proficiency in business analysis:* It will be expected that the Solutions Architect (generally under the management of a Business Consultant) will assume leadership responsibility for preparing for and facilitating

requirements sessions, capturing notes, and writing requirements documents (such as a Statement of Work and Business Process Assessment). These documents will be used to manage project implementation for our clients.

2. *Demonstrate high proficiency in configuration:* The Solutions Architect will focus extensively on the configuration of solutions to meet requirements identified by our clients and documented by C5 Insight. Successful candidates will have proven skills in configuring at least one of the aforementioned technology platforms. Ideal candidates will hold a certification in at least one of the aforementioned technology platforms and will have deeper skills with:
  - a. Installation (of server and desktop software)
  - b. Workflows (developing custom workflows)
  - c. Scripting (writing JavaScript and other client side code)
  - d. Reporting (using SSRS or other report-writing tools)
  - e. Scribe, BizTalk or SSIS (to preform data migration and systems integration work)
  - f. Development (while this position is not for a developer, development skills can be very helpful)
3. *Demonstrate the ability to train end users and administrators.* Solutions Architects need to transition their knowledge of various solutions, and the customizations made for each client, to the end users and administrators at the client. This includes the ability to develop training materials and the ability to effectively train groups of up to 30 individuals either in person or via web-based training.
4. *Demonstrate the capability to rapidly learn to configure other development platforms:* Solutions Architects are expected to be able to support at least 2 different platforms within 180 days of joining C5 Insight. This will include self-training, shadowing others, participating in client assignments and initial configuration of these systems. The Solutions Architect is expected to hold at least two certifications at the end of their initial 90 days with C5 Insight, and at least 4 at the end of their initial year with C5 Insight.
5. *Work on project teams:* The Solutions Architect is expected to work with a Project Manager to develop plans based on client requirements; in some cases, the Solutions Architect may take on a Project Manager role (for smaller projects). The Solutions Architect is expected to document requirements and lead meetings for Technical Architects (developers and infrastructure designers) in order to communicate requirements in sufficient detail to enable these individuals to get their work done. In some cases, developers may be contract and/or near-shore resources.
6. *Quality assurance:* The Solutions Architect is expected to ensure the quality of their work and is expected to perform quality assurance testing of work delivered by developers.
7. *Business development:* The Solutions Architect is expected to participate in a number of Business Development activities. BLOG entries must be made at least once monthly. The individual will need to participate in new client presentations on an as needed basis – participating in the development of demonstrations and proofs-of-concept when necessary. The individual will also need to attend and participate in events held by C5 Insight.
8. *Support and Helpdesk:* The Solutions Architect is expected to provide complete support and help desk services to all of our clients on an as needed basis.
9. *Partnership with co-workers at C5 Insight:* The Solutions Architect is expected to partner with co-workers at C5 Insight to the benefit of the organization. This includes proactively identifying individuals that may require assistance in providing exceptional deliverables, and accepting requests for support with consulting, configuration and training work from other employees. It is expected that all service will be rendered with the same level of quality, service, value, leadership and excellence – and that all recommendations made to our clients are in the best interest of our clients. Moreover, the Solutions Architect will readily seek the support of others when needed to ensure that all client deliverables are on time and of the highest possible quality.
10. *Uphold the values of C5 Insight.* Our company is experiencing significant growth because of the outstanding reputation we have established in the marketplace. The Solutions Architect is expected to play an important role in maintaining our reputation. This includes a commitment to making our client base 100% referencable,

approaching co-workers and clients with a service attitude, providing value to the client with every communication and deliverable, playing a leadership role in guiding our clients towards effective solutions, and delivering excellence in all work products.