

DAVID STOTT MBA

AI Deployment Strategist | Agentic AI & Data Cloud | Forward Deployed Engineering Partner

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"Customer impact from day one — strategic clarity and execution that sticks."

PROFESSIONAL SUMMARY

AI Deployment Strategist and customer-facing technical advisor with 20+ years leading complex, ambiguous engagements end-to-end across the full value lifecycle — Identify, Commit, Deploy, Consume — for enterprise Salesforce customers. Defines Agentic AI strategy and roadmaps, leads design workshops, agent design sessions, and Jobs-to-Be-Done analysis, and architects solutions spanning Agentforce, Data Cloud, and enterprise systems with responsible AI governance from the start. Partners closely with Forward Deployed Engineers, owning program management, timelines, risk, and stakeholder communication as the operational backbone of the delivery team, then owns adoption, consumption, and expansion metrics to ensure lasting, scalable value. Hands-on with Apex, Flow, and AI-accelerated development (Claude, Claude Code, Cursor-class tools), with a Salesforce Forward Deployed Engineer background, an MBA, and deep AI credentialing.

CERTIFICATIONS & CREDENTIALS

Salesforce Certifications

- Salesforce Certified Agentforce Specialist
- Salesforce Certified Data 360 Consultant
- Salesforce Certified Service Cloud Consultant
- Salesforce Certified Platform Administrator
- Salesforce Certified Platform Foundations
- Salesforce Certified Sales Foundations
- Salesforce Certified MuleSoft Integration Foundations
- Agentblazer Legend 2026

AI Certifications

- Salesforce Certified AI Specialist
- Salesforce AI Forward Deployed Engineer (FDE)
- Model Context Protocol (MCP) — Anthropic
- Building with the Claude API — Anthropic
- Claude Code in Action — Anthropic
- Agent Skills — Anthropic
- Google AI & AI for App Building — Google
- Generative AI for Project Managers — PMI

PROFESSIONAL EXPERIENCE

Principal Consultant / Salesforce Forward Deployed Engineer — Uptima 05/2025 - Present • Remote

- Own full-lifecycle customer engagements (Identify → Commit → Deploy → Consume) for enterprise Salesforce customers, serving as the primary customer-facing contact and building trust-based relationships with senior stakeholders.
- Partner closely with Forward Deployed Engineers to align Agentic AI strategy with technical execution, serving as the operational backbone of the delivery team across timelines, stakeholder communication, and risk escalation on 12-week engagements.
- Define Agentic AI strategy and roadmaps; lead design workshops, agent design sessions, and Jobs-to-Be-Done analysis; architect solutions spanning Agentforce, Data Cloud, and enterprise systems with responsible AI governance built in from the start.
- Assess customer AI readiness and guide change management and process transformation to maximize agent adoption; own adoption, consumption, and expansion metrics, identifying blockers early to drive measurable value realization.
- Develop customer solutions using AI-accelerated tools (Claude, Claude Code) and synthesize field insights into product feedback — including a 6-week Agentforce pilot that drove a \$500K revenue increase across 210 users.

Principal Consultant, Strategic Pre-Sales Advisor — Atherian Consulting 04/2023 - 05/2025 • Remote

- Independent Agentic AI strategy and pre-sales consulting practice — running discovery, agent design, and proof-of-concept builds across the full value lifecycle (Identify → Commit → Deploy → Consume) for client engagements.
- Drove AI-enabled transformation of customer care operations using Einstein Next Best Action to redesign case management and intelligent workflow routing — reducing average handle time 43%, increasing call deflection 39%, and cutting case resolution time 67% through automation.
- Coached client organizations on forming an advisory board and Center of Excellence, growing campaign contributions 65% and sustaining a 97% client renewal rate through disciplined engagement cadence and value realization.

Director, Salesforce Platform — Republic Finance 12/2023 - 11/2024 • Plano, TX

- Owned recovery of a \$35M enterprise transformation supporting more than 1,300 users after six failed deployment attempts, holding milestones and executive cadence to restore delivery and account health.
- Established program governance, executive steering committees, measurable KPIs, and a sustainable operating model.
- Modernized Financial Services Cloud, MuleSoft, Kafka, Snowflake, and enterprise integrations while reducing technical debt by 47%.

Engagement Manager — Salesforce Professional Services 10/2019 - 12/2023 • Remote

- As Engagement Manager, led and scoped large-enterprise deployment engagements — partnering cross-functionally with sales and delivery to define scope, teams, governance, and success criteria.
- Led enterprise deployments across Financial Services, Insurance, Manufacturing, Automotive, Commerce & Retail, and Higher Education, directing multidisciplinary teams and facilitating executive alignment.
- Directed multidisciplinary, geographically dispersed consulting teams delivering measurable outcomes across multimillion-dollar deployment programs.

Director, CRM Strategy — Ameritas Financial 08/2018 - 09/2019 • Lincoln, NE

- Consolidated six disparate Salesforce orgs for a financial services and insurance carrier into a single enterprise operating model, reducing operational cost and increasing cross-sell revenue 25% in the first year.
- Launched omni-channel service operations, reducing average handle time 60% and increasing first-call deflection 85%.

Director, PMO — Bellevue University 07/2013 - 07/2018 • Bellevue, NE

- Directed the Connected Campus transformation using human-centered design and journey mapping before recommending technology solutions.
- Delivered 39% enrollment growth within six months and 89% year-over-year growth; presented outcomes at Dreamforce.

- Founder and CIO of a healthcare technology company (medical transcription, proprietary EHR, and healthcare CRM) serving Academic Medical Centers — including the University of Nebraska Medical Center — and broader health systems, scaling to \$50M+ in revenue while serving more than 1 million patients annually with 97% customer retention.
- Built and maintained HIPAA-compliant systems handling protected health information, with HL7 data integration connecting the EHR platform to hospital and clinical systems — direct experience deploying technology in a regulated industry.

EDUCATION

Master of Business Administration (MBA), Bellevue University · Bachelor of Science, University of Nebraska at Omaha

Business Before Technology